Research report: exploring the attitudes and needs of family visitors

Tuesday 17 June 2025

Research by:

BAKERRICHARDS

Data into insight into potential

Commissioned by:

ALVA

Image by Wolfgang Weiser from Pixabay

Contents

Introduction from Baker Richards

We're delighted to share the findings from this new research into the family market, commissioned by the Association of Leading Visitor Attractions (ALVA) and undertaken by the team at Baker Richards.

The aim of this work was to better understand how adults who regularly care for children - whether as parents, guardians, or in other roles - are making choices about leisure.

Drawing on new survey data and wider context, the report explores how decisions are made, how value is being judged, and what families are looking for when they plan a day out.

Throughout this report, we've used the word *family* as shorthand - but we're mindful that the term doesn't always reflect the full diversity of people's experiences, relationships or identities.

Our thanks go to Bernard Donoghue and the ALVA team for their leadership and support, and to the many member organisations who helped shape this work.

We hope the insights prompt meaningful conversations - not just about pricing or programming, but about how we create experiences that feel welcoming, worthwhile and emotionally resonant for those who care for children.

If you'd like to explore what any of this might mean for your organisation, we'd be happy to talk further, please do get in touch at info@baker-richards.com

David Reece
Chief Strategy Officer, Baker Richards

Libby Papakyriacou
Senior Consultant, Baker Richards

Introduction from ALVA

When the pandemic hit we were very clear in our advice to Government, to businesses and the media that tourism was hit first, hit hardest and would take the longest to recover. So it has proven. As we came out of lockdown we went straight into a cost of living crisis and a series of variables - such as greater energy prices, inflation, supply chain and staffing challenges - that pose serious challenges to the financial growth and recovery of visitor attractions.

The last couple of years have seen a greater move to attractions monetising their existing assets - especially where they do not have funds to invest in infrastructure and visitor experiences - and to incentive visits. The family market is often the default 'go-to' demographic for recovery and to spur visits and re-visits, but this was also the market and demographic which were telling us that they were most affected by the cost of living crisis. So we needed to understand their stresses better, in order to formulate our responses and identify opportunities in a more sensitive and sophisticated way.

We commissioned Baker Richards to give us a better idea of what the UK family market looks like, how it behaves, how it thinks, and how far we can test our existing assumptions and generalisations.

The resulting research is fascinating, inspiring, enlightening and reassuring. It confirms some of our great marketing instincts, but challenges others; it challenges our assumptions of what and who constitutes a family and enlightens us on the prevalence of families where members may have special educational needs, prompting us to further think what that means for our operations and visitor experience.

During the pandemic we gave our commissioned research into customer and visitor sentiment free to the sector, believing, as we do, that we have a duty to support the entire ecosystem of the visitor economy, and attractions in particular. We give this research to the wider sector again in the hope that it can assist attractions in their sustainable recovery and growth and that they may better meet and exceed the needs of the family market.

Bernard Donoghue OBE
Director and Chief Executive, ALVA

Executive Summary

This research was commissioned by the Association of Leading Visitor Attractions (ALVA) and carried out by Baker Richards to explore how families with children are approaching leisure choices in 2025 - not just in terms of what they do, but how and why they make those decisions.

The findings are based on a census-balanced panel of over 1,000 UK adults who regularly care for children under 16, supported by wider sector analysis and contextual insight.

Key findings include:

Strategic spending: Families are not spending less, but they are more selective - weighing emotional, logistical, and financial value carefully.

Diverse structures: Just 41% of families find traditional “family tickets” suit their needs, reflecting a growing diversity in household structures and caregiving roles.

Emotional value drives satisfaction: Children’s enjoyment and memory-making matter more than time spent or volume of content.

Accessibility is essential: 41% of families include a child with special educational needs. Accessibility is no longer a niche consideration - it’s a mainstream priority.

Booking behaviour is split: Most families research far in advance but delay booking until the last 48 hours - requiring marketing strategies that inspire early and convert late.

Families build days, not visits: Attractions aren’t competing with one another - they’re part of a wider ecosystem of free and paid options. Success lies in becoming the emotional high point in a curated day out.

This report also identifies three key segments within the family market - *Value Planners*, *Wildlife Explorers* and *Discovery Seekers* - and offers practical recommendations for attractions looking to improve relevance, pricing, design, and communication.

While the research focuses on those who regularly care for children, it also opens up wider questions about how we define “family,” and how we can serve this audience with greater empathy, clarity, and imagination.

Some of the key questions we wanted to investigate with this research include:

How much are families willing to pay for their days out? How has this changed?

What do families expect and value from a family day out?

How do families research and book their days out?

What are the primary motivations for a family day out?

How does this behaviour change with different age groups?

The changing landscape for families

Before exploring the data gathered from our research, we should take into account the wider context illuminated by sources of data and evidence which already exist.
We noted that:

- Over **60%** of UK households entered this year with **less disposable income**. Families are making harder choices about every pound they spend on leisure.*
- **Income inequality is widening**, with the gap between high-income and low-income families growing. Even those earning more feel stretched, meaning a 'one-size-fits-all' approach to pricing is missing opportunities.
- In 2023, there were **19.5 million families in the UK**, an increase of just over 1.1 million families (6%) since 2013**
- There were **3.2 million lone-parent families** in 2023, an increase from 3.0 million in 2013. These families often face significant financial pressure, meaning our offerings need to reflect this growing diversity**
- Nearly **1 in 5 (1.9 million)** children have identified Special Educational Needs. This is a growing segment looking for welcoming and appropriate experiences.†
- **High-quality parks and community spaces** are now routine family choices. They offer a flexible, low-cost alternative that paid attractions must acknowledge and complement.
- Families compare us to **seamless digital experiences** like Amazon or Uber. They expect easy booking, clear information, and excellent service – anything less stands out.

*https://www.retailgazette.co.uk/blog/2025/01/asda-disposable-income
**https://www.ons.gov.uk/peoplepopulationandcommunity/birthsdeathsandmarriages/families/bulletins/familiesandhouseholds/2023
† https://publications.parliament.uk/pa/cm5901/cmselect/cmpubacc/353/report.html

The changing market

Our survey showed that the UK family attractions market is fundamentally changing.

- Families aren't spending less overall; they're **investing more strategically** in meaningful experiences. They are far more selective.
- While visit frequency has slightly reduced, families are willing to **exceed their monthly leisure budgets** for the 'right' experiences.
- Pricing over **£35** per person is achievable when the experience clearly justifies the investment. The deeper issue often isn't price, but value for money.
- Traditional "family tickets" only work for **41%** of families due to the rise of diverse modern family structures (e.g., single parents, multi-generational groups).
- **41%** of families include a child with Special Educational Needs (defined as requiring additional support with their learning or development based on our survey)*. These families are **more likely to return** and become strong advocates if they feel welcome.
- Children's enjoyment is particularly highlighted by **67%** of parents, and memories created by **60%**. Children's influence significantly impacts repeat visits.
- While **49%** of families research weeks ahead, **44%** book within just 48 hours of their visit.
- Visitors have mixed feelings about digital technology on-site - some seek less screen time, others want engaging digital elements (including VR/AR). Families with SEN are particularly excited about digital innovation possibilities.

* In our dataset. Note that this is higher than reported elsewhere, for example in 2024/25, 14.2% of school pupils in England were recorded to have SEN, https://explore-education-statistics.service.gov.uk/find-statistics/special-educational-needs-in-england/2024-25
Survey question: 'Do any of the children under 16 you care for have special educational needs or require additional support with their learning or development?'

Introducing the research, and the respondents

Understanding the research

- The survey was in the field, open to responses, between 29 April 2025 and 7 May 2025.
- It was shared with a Census-balanced panel of respondents across the UK by a reputable market research company
- Respondents were filtered so that the survey was completed only by parents or regular guardians/carers of children under the age of 16.
- A total of 1,063 responses were received. (n=1,063 unless otherwise stated)
- Weighting was applied based on Office for National Statistics (ONS) social grade data, to ensure a balanced response.

Ages & Stages

- We have broken our analysis into segments, or groups, based on the ages of children being cared for by the respondent, as follows.

	Respondents
Pre-school – under 5s	424
Primary – 5-11	456
Secondary – 12-16	482

- Note – these segments are not mutually exclusive: there is crossover where some family groups have a mix of e.g. pre-school and primary aged school children. Some respondents also have over 16s in their households. Those with only over 16s were excluded from this research.

	Pre-school	Primary	Secondary	Over 16
Pre-school	282	121	54	9
Primary	121	211	157	22
Secondary	54	157	304	66
Over 16	9	22	66	0

Budgets and perceptions of value

In brief:

- Family leisure budgets reveal a clear reality:
  nearly three-quarters of families have less than £200 monthly for all leisure activities, yet most spend over £100 on a single day out. This paradox shows families view these excursions as special occasions worth saving for, typically managing two or three annually.

- Families cope by splitting visits between free (60%) and paid (40%) attractions, prioritising children's enjoyment and memory-making when they do spend.

- However, over 40% find standard family tickets don't match their family structure, creating additional access barriers alongside financial pressures.

Key findings:

- 74% of families have less than £200/month for all leisure activities
  - 36% have less than £100/month available
  - 62% spend over £100 on a typical family day out

- 2-3 times per year is the most common frequency for family days out

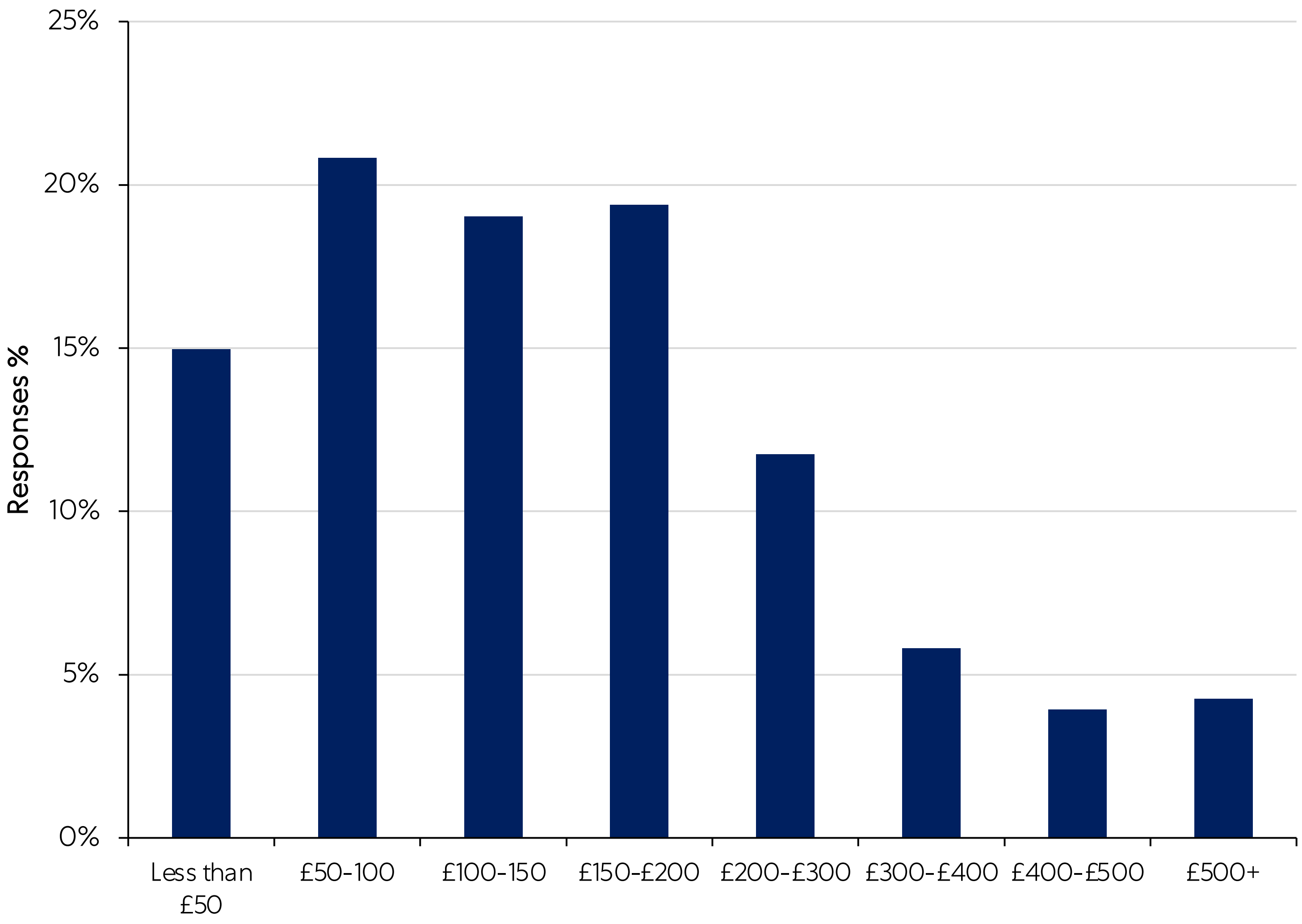
- 60% of family visits are to free attractions, 40% to paid

- Children's level of enjoyment is the number one driver of value

- 41% find family tickets don't match their family structure, but 41% also report they expect family tickets work out cheaper

- Cost of living pressures are the primary factors constraining an increase in future engagement

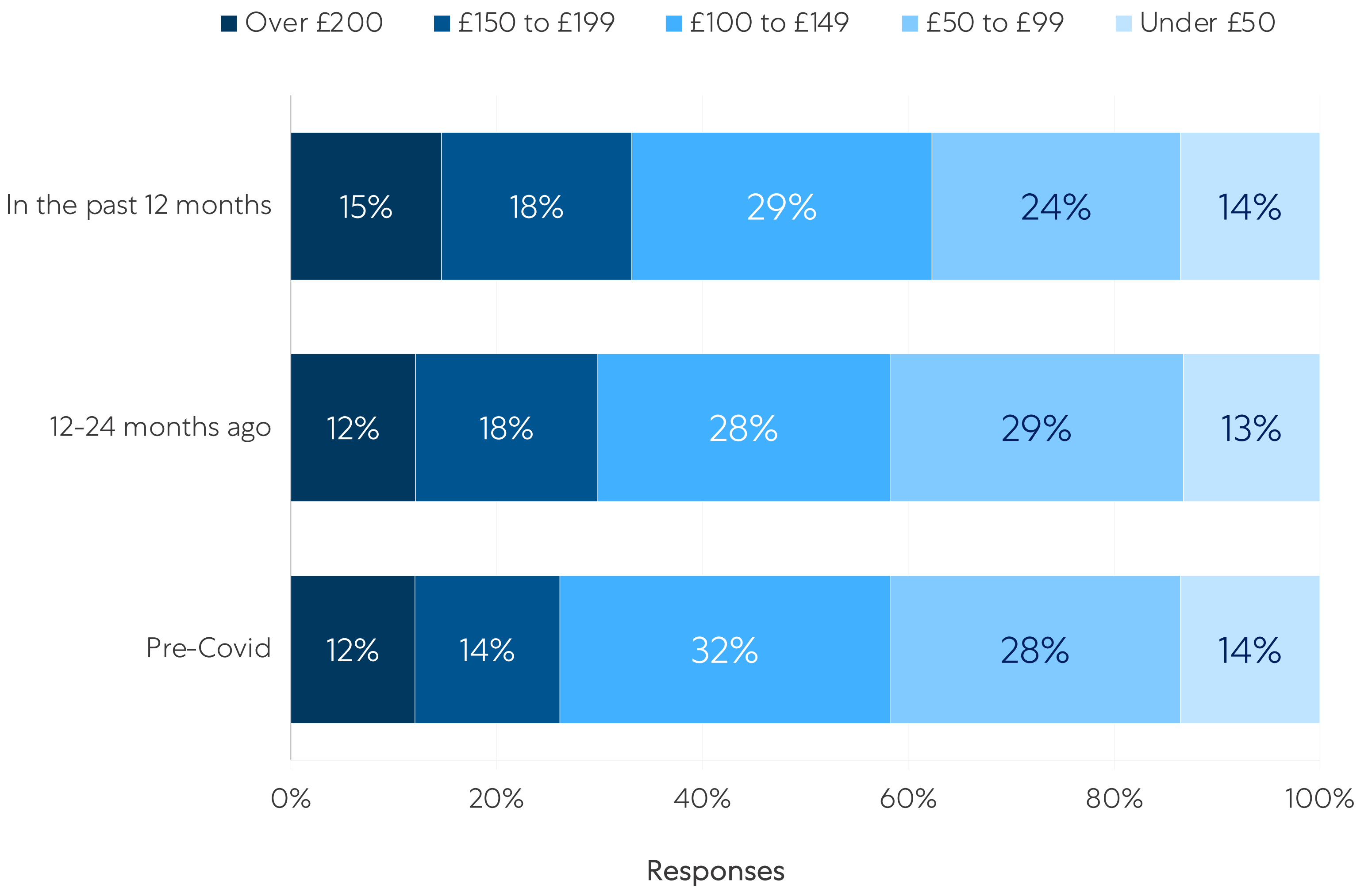
How much do you have to spend on leisure activities as a household, each month?



n=1,063

- 36% families have less than £100 to spend on leisure activities as a household, per month.
- 74% have less than £200.
- However, day out spend can often be higher than monthly leisure budget. Suggesting these days out are something to be saved for, and highly valued.

Typical spend for the whole family on a day out (including travel, food, tickets)



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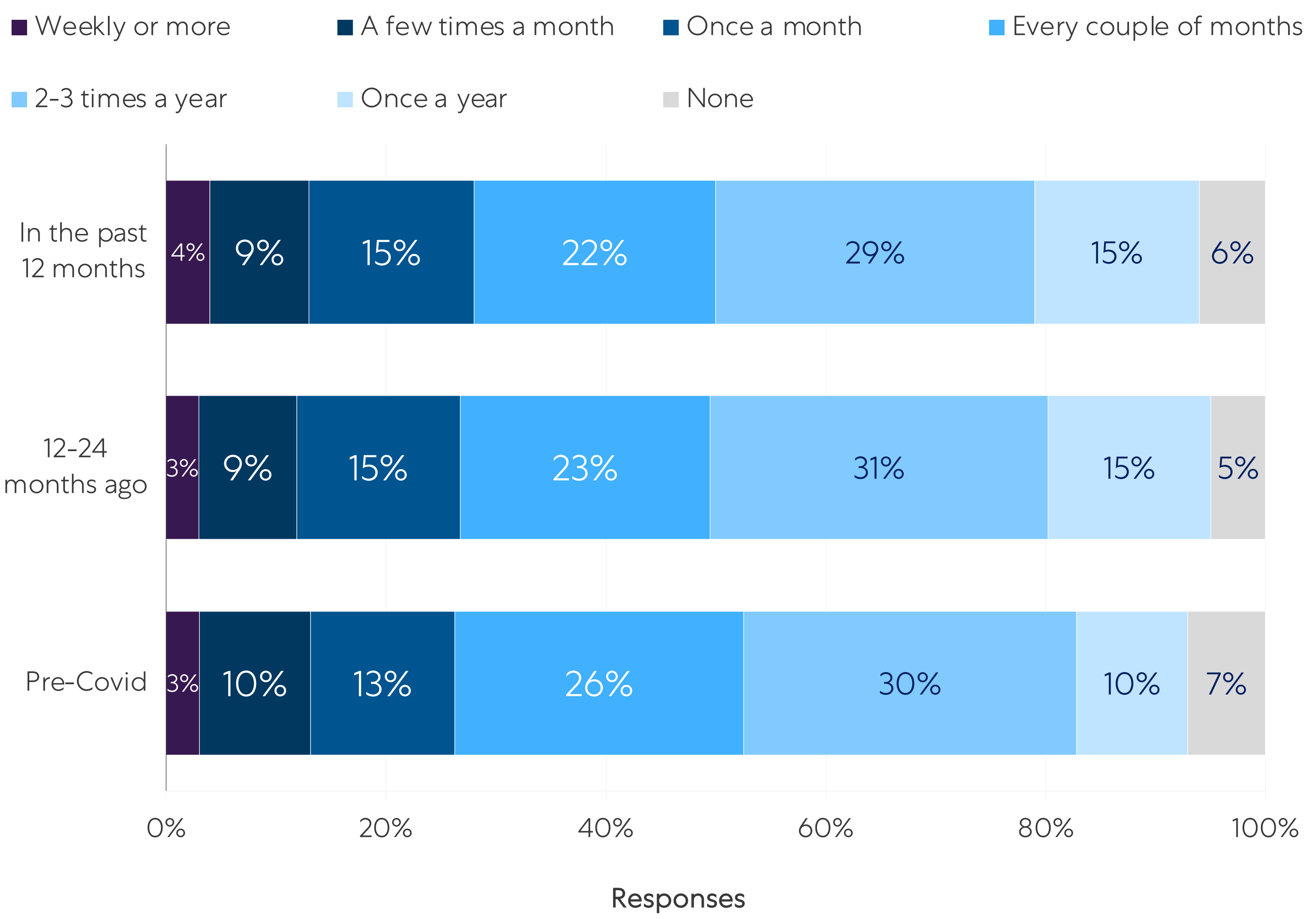
- We can see a slight increase in expected spend on a day out in the past 12 months, and again comparing the previous year to pre-Covid.
- Note that over 62% of respondents expect to spend over £100 on a day out, while 63% say they have £100 or more to spend on leisure per month.
- So a day out is a significant outlay in the family budget.

How many family days out do you typically take a year?



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- Reported frequency has contracted slightly in the past year.
- The majority of respondents however report going on a family day out fairly regularly across the year.

Leisure budget against days out frequency in past 12 months

We asked respondents what their typical spend was on a day out, and how often they had days out as a family, 2-3 times a year was the most common frequency. Overall, people who typically spend more on a day out are also more frequent.

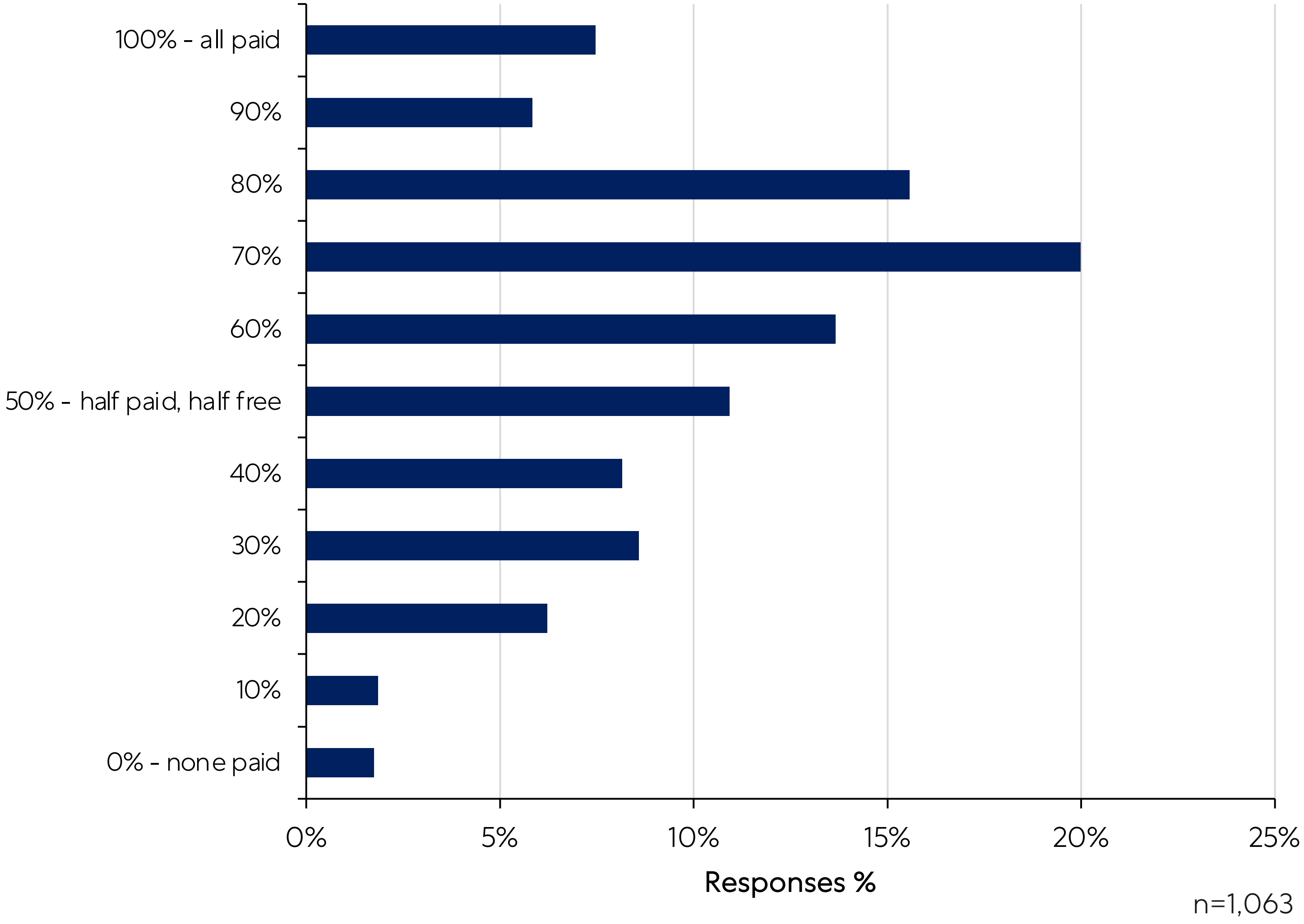
Typical day out spend

Leisure Budget

	Weekly or more	A few times a month	Once a month	Every couple of months	2-3 times a year	Once a year	None
Less than £50	1%	3%	7%	18%	27%	26%	19%
£50-100	3%	9%	14%	19%	35%	14%	7%
£100-150	2%	7%	13%	30%	29%	14%	4%
£150-£200	2%	10%	21%	26%	24%	15%	2%
£200-£300	8%	13%	22%	16%	30%	10%	2%
£300-£400	4%	17%	19%	29%	22%	9%	0%
£400-£500	14%	9%	16%	21%	24%	16%	0%
£500+	18%	14%	7%	4%	46%	10%	1%

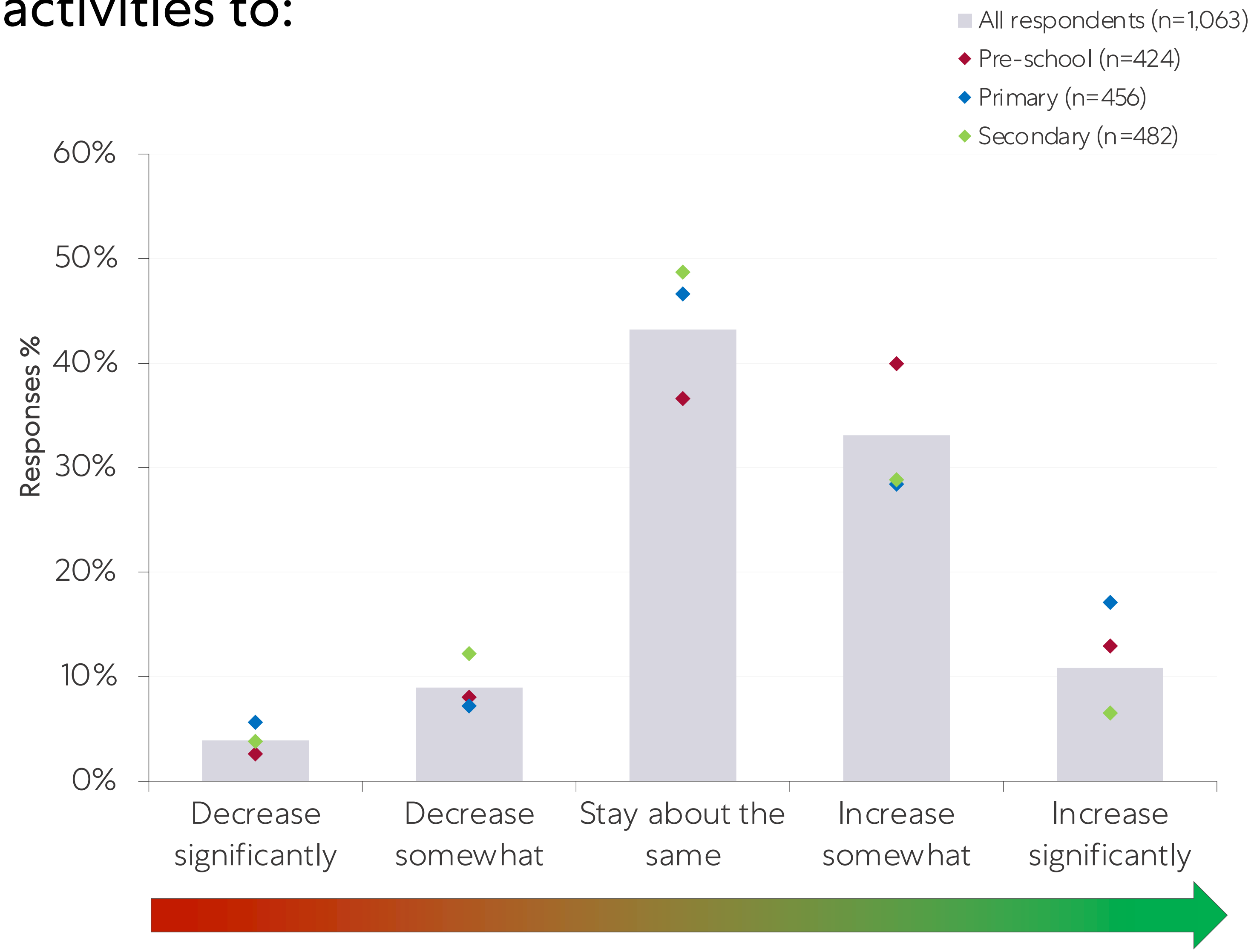
n=1,063

What proportion of your days out are to free attractions as opposed to ones with a paid entry fee?



- Families are splitting their time across paid and free activities.
- Overall, the average is 60% of visits to free attractions, vs 40% to paid attractions.

Looking ahead to the next 12 months, do you expect your family's engagement with paid family activities to:



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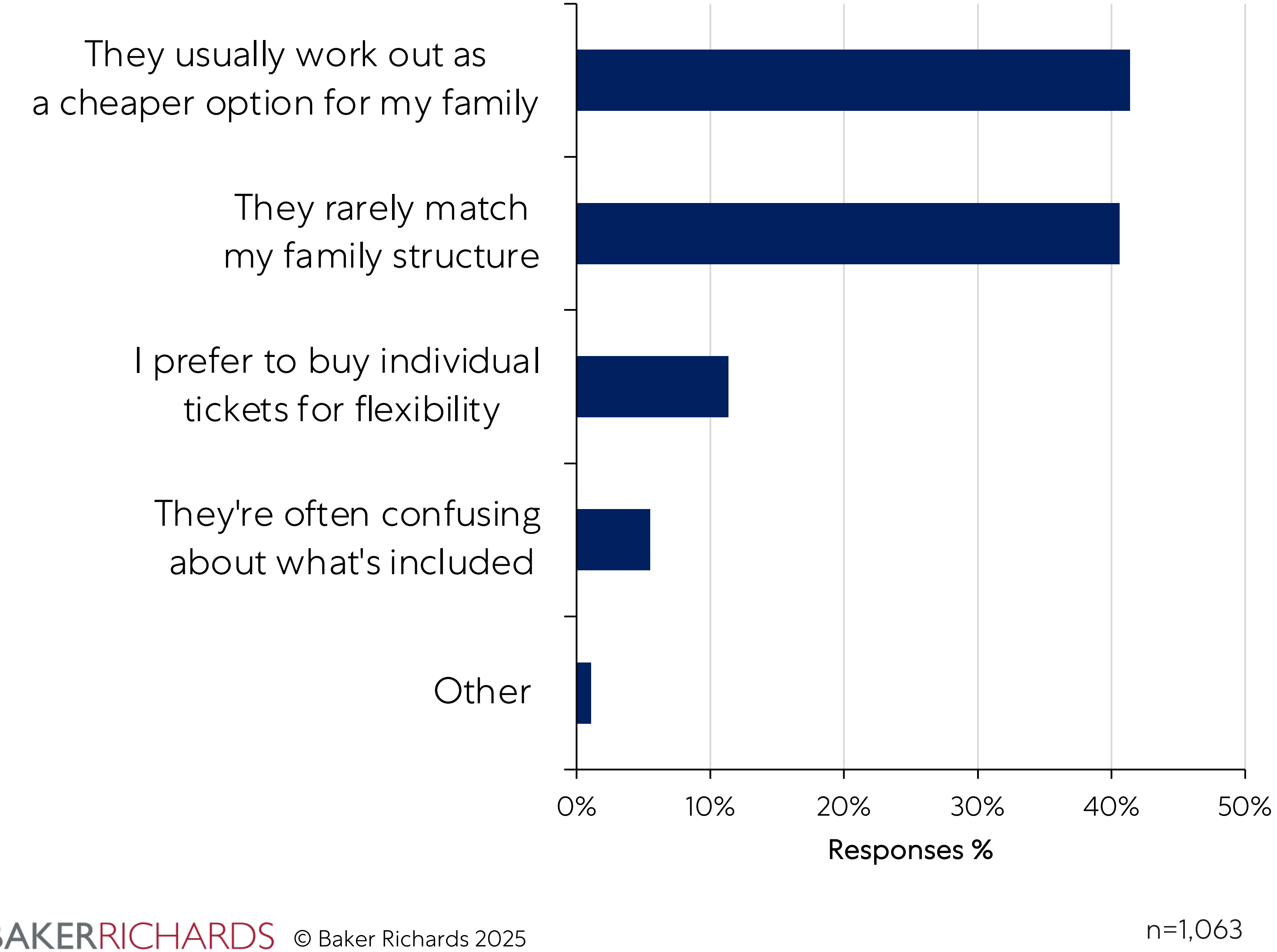
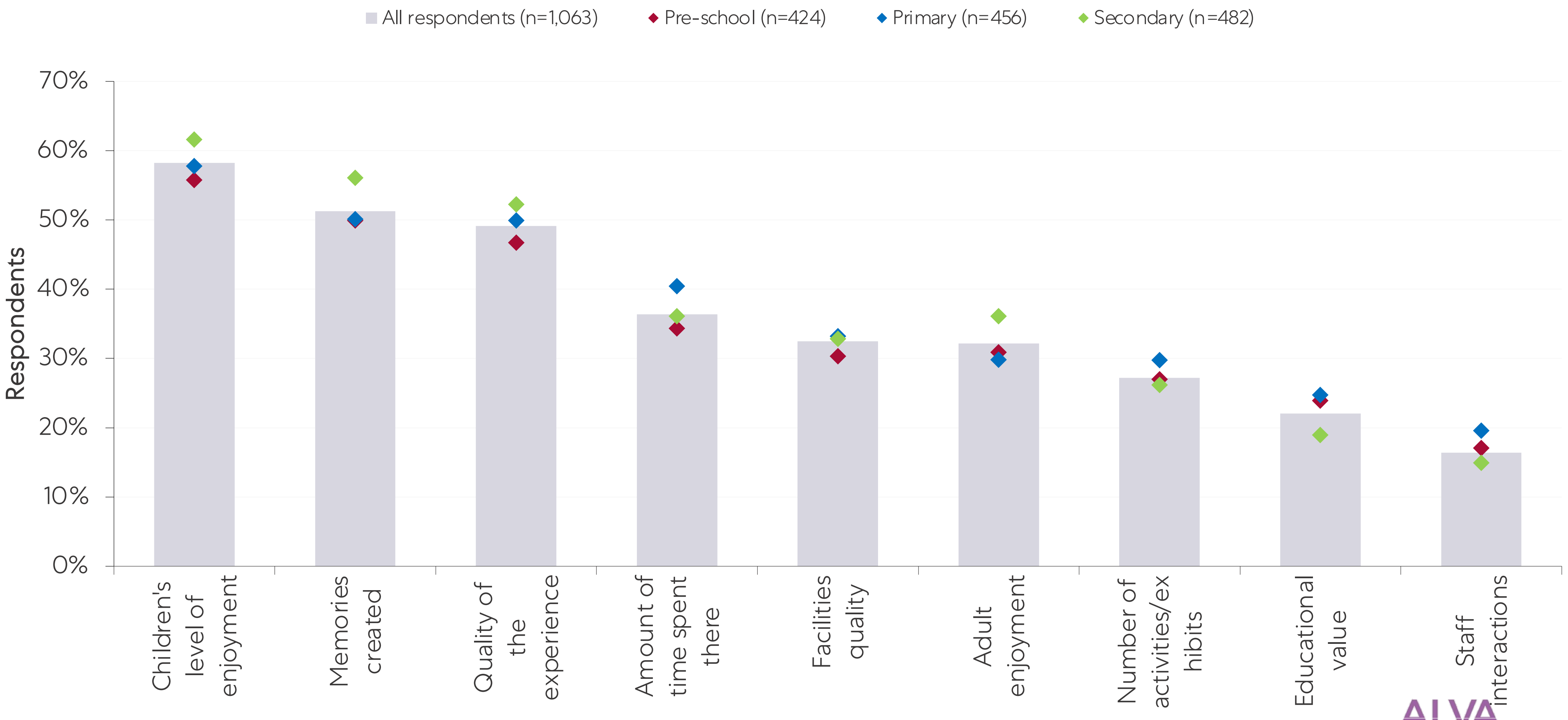
- Cost of living and financial pressures are the key reasons behind both why engagement would stay about the same, and potentially decrease.
- Children's changing ages also play a part in why activity levels change both positively and negatively.
- For those increasing, many mentioned wanting to create memories, and prioritising family time and experiences – especially after COVID.

What do you think about "family tickets"?



- 41% respondents reported family tickets working out cheaper for them.
- But a similar number reported them not matching their family structure.
- Other responses valued the flexibility of individual tickets.

After your family has spent a day at an attraction, what makes you feel you've received good value for money? (Select all that apply)



Segmentation

Based on Choice-Based Conjoint Analysis

Choice-based conjoint analysis is a research method where people are shown different versions of a visit with varying features and prices, and then asked to choose which they'd prefer – this helps us to understand which features matter most to visitors when making purchase decisions.

n=510 A non-responsive segment were excluded from analysis in this section

In brief:

- Market segmentation analysis reveals three distinct family audience groups with markedly different preferences and price sensitivities.
  - **Wildlife Explorers** (45%) prioritise animal experiences and workshops at settings such as zoos and aquariums.
  - **Value Planners** (32%) focus primarily on affordability.
  - **Discovery Seekers** (22%) have a wider interest across wildlife, but also natural history museums and gardens. They prefer full-day experiences with activity packs.

- Price sensitivity varies across segments, creating both challenges and opportunities for attractions.

Key findings:

- 45% are Wildlife Explorers - prioritising wildlife experiences and are moderately price-sensitive
  - Wildlife is the #1 preferred type of day out across all segments
- 32% are Value Planners - highly price-sensitive, primarily driven by affordability
- 22% are Discovery Seekers - prefer full-day experiences with activity packs
  - Science & nature ranks as #2 preference for Discovery Seekers
- £25 is the optimal adult price point for balancing volume and income
- £35 marks the price point where overall adult ticket demand drops significantly, however Value Planners show rapid demand drop after £10
- 60% have a preference for a full-day of experiences vs 40% for half-day
- 25% child discount is particularly motivating for Value Planners

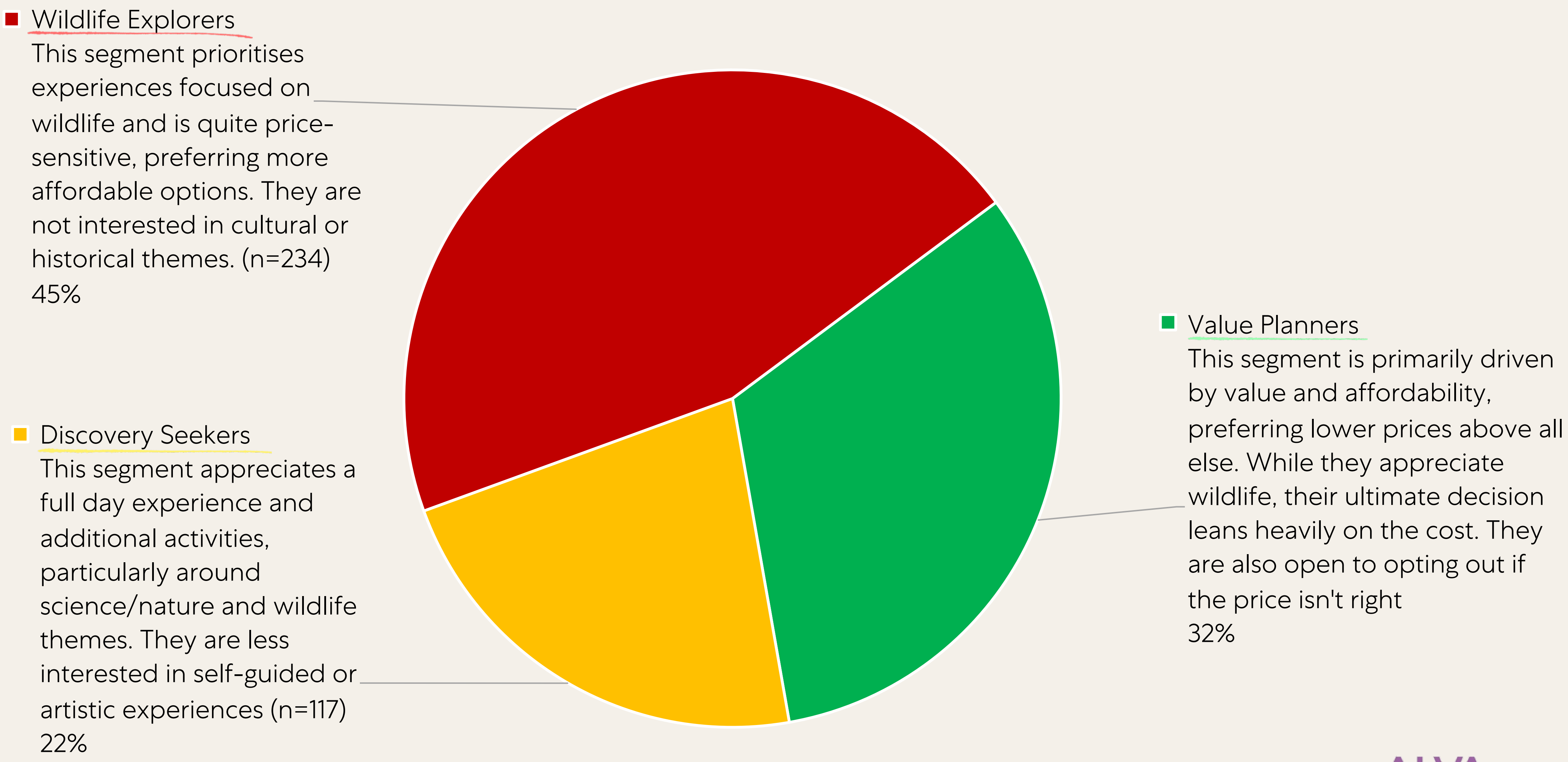
What we tested

In this part of the research, we tested the demand for different types of days out, add-ons, visit duration, and prices. Respondents were shown visits that combined a random option from each of the columns below and asked which they would choose, or to specify if none of the options appealed. Respondents were each shown multiple possible combinations.

Type of Day Out	Add-ons	Duration	Adult Price	Child Discount
Wildlife & animals (e.g. zoos and aquariums)	Self-guided (activities extra)	Full day experience (4+ hours)	£10	25% discount
Art & design (e.g. art galleries)	Family activities included e.g. workshops	Half-day experience (2-4 hours)	£15	No discount
Science & nature (e.g. science and natural history museums)	Activity pack included		£20	
History & heritage (e.g. castles & historic houses)			£25	
Gardens and parks (e.g. botanic gardens)			£30	
			£35	
			£40	

Three key market segments emerged from this part of the research

The conjoint analysis revealed that family audiences are split into three distinct groups, and in this section we'll show how their responses vary.



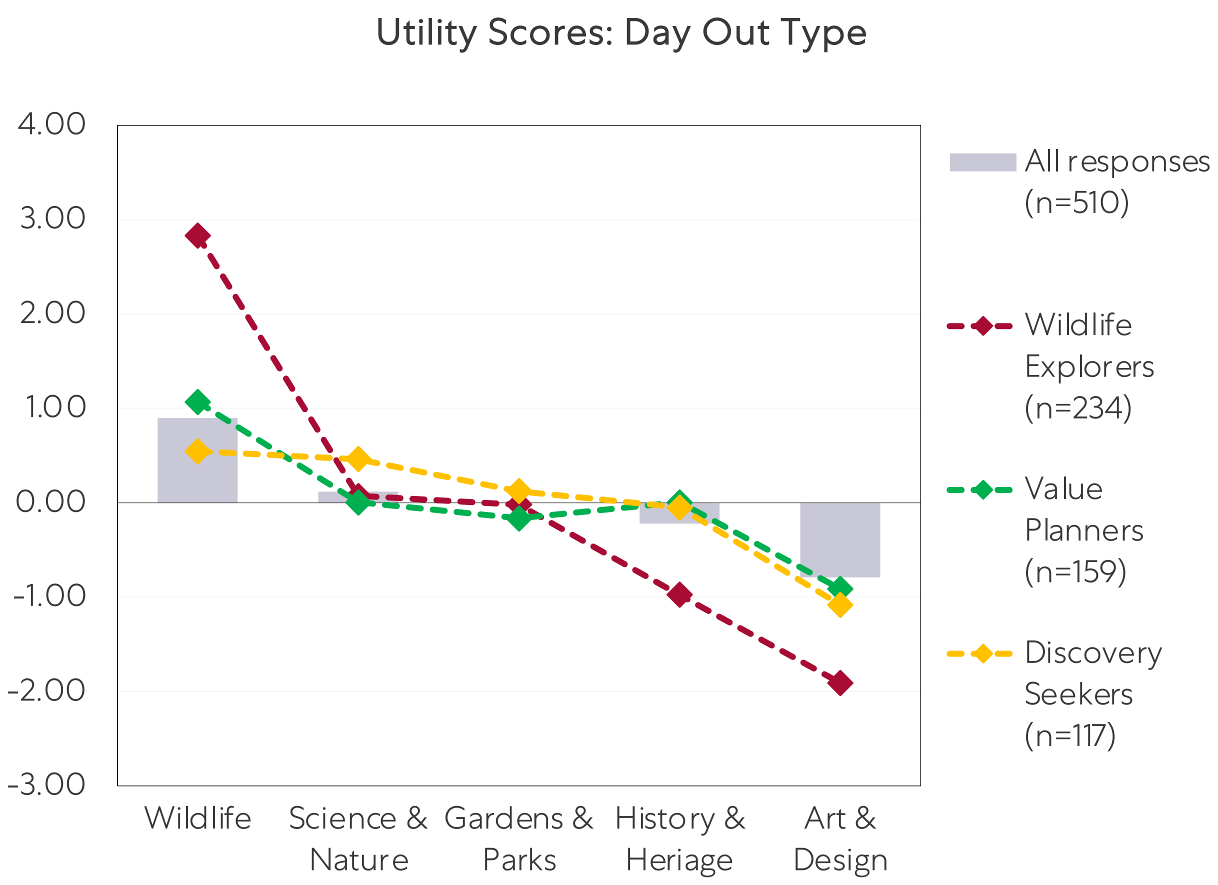
? Explainer: Conjoint Analysis Utility Scores

The charts in this section show utility scores – you can think of these as preference points that show how much visitors like or dislike different options at attractions.

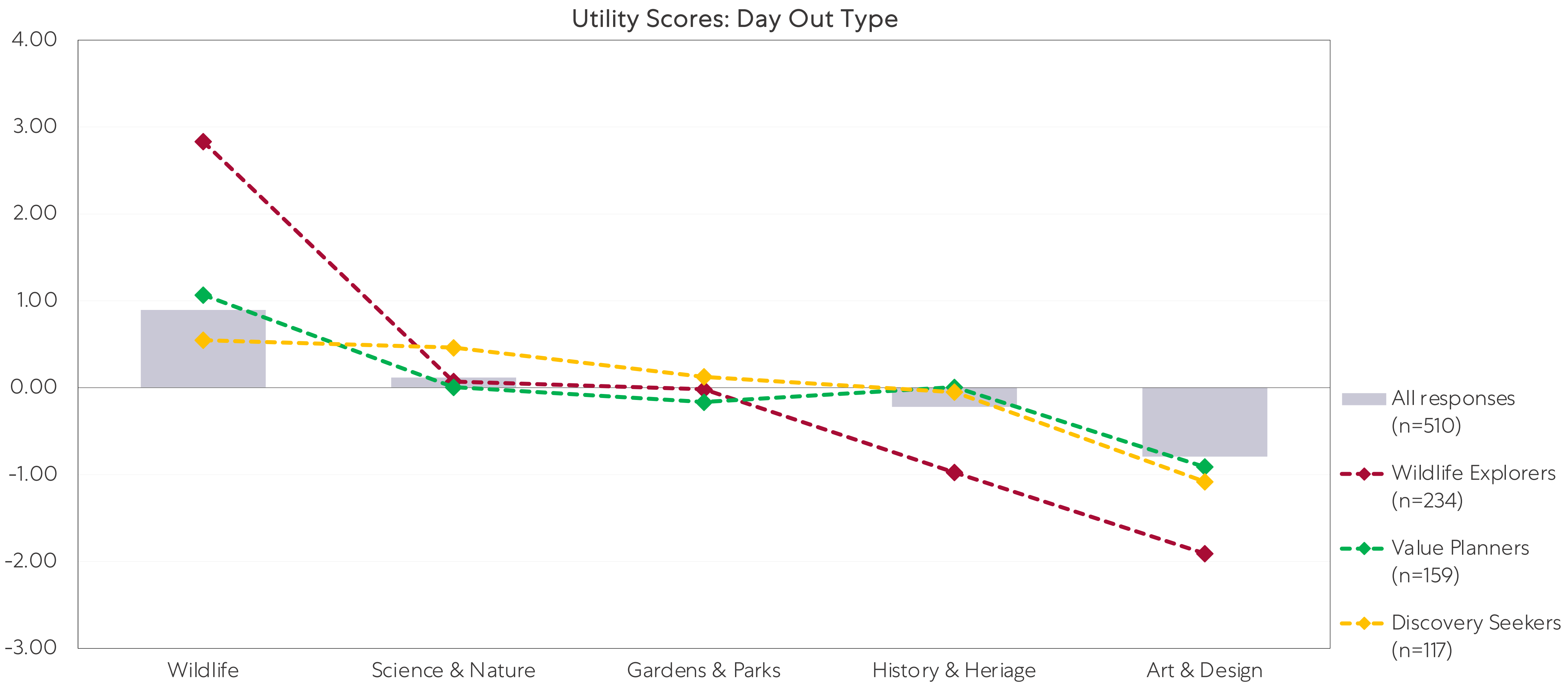
Utility scores are similar to rating different features of a theme park or museum on a scale – but with added depth which help to predict real behavior with greater accuracy:

- Each attribute we test receives a score showing how attractive it is **compared to the alternatives available**.
- Scores are relative within each specific feature or attribute (e.g., price levels, add-ons). You shouldn't directly compare a utility score for a price point to a utility score for an add-on, as they are measured on different scales
- The scores in the chart "sum to zero" – so if one option goes up (positive score), another must go down (negative score). The total always balances out to zero. This forces the scores to show relative preferences rather than simply saying "everything is attractive".
- A negative score doesn't necessarily mean visitors 'dislike' that option outright, but they prefer it less than other options within the same category

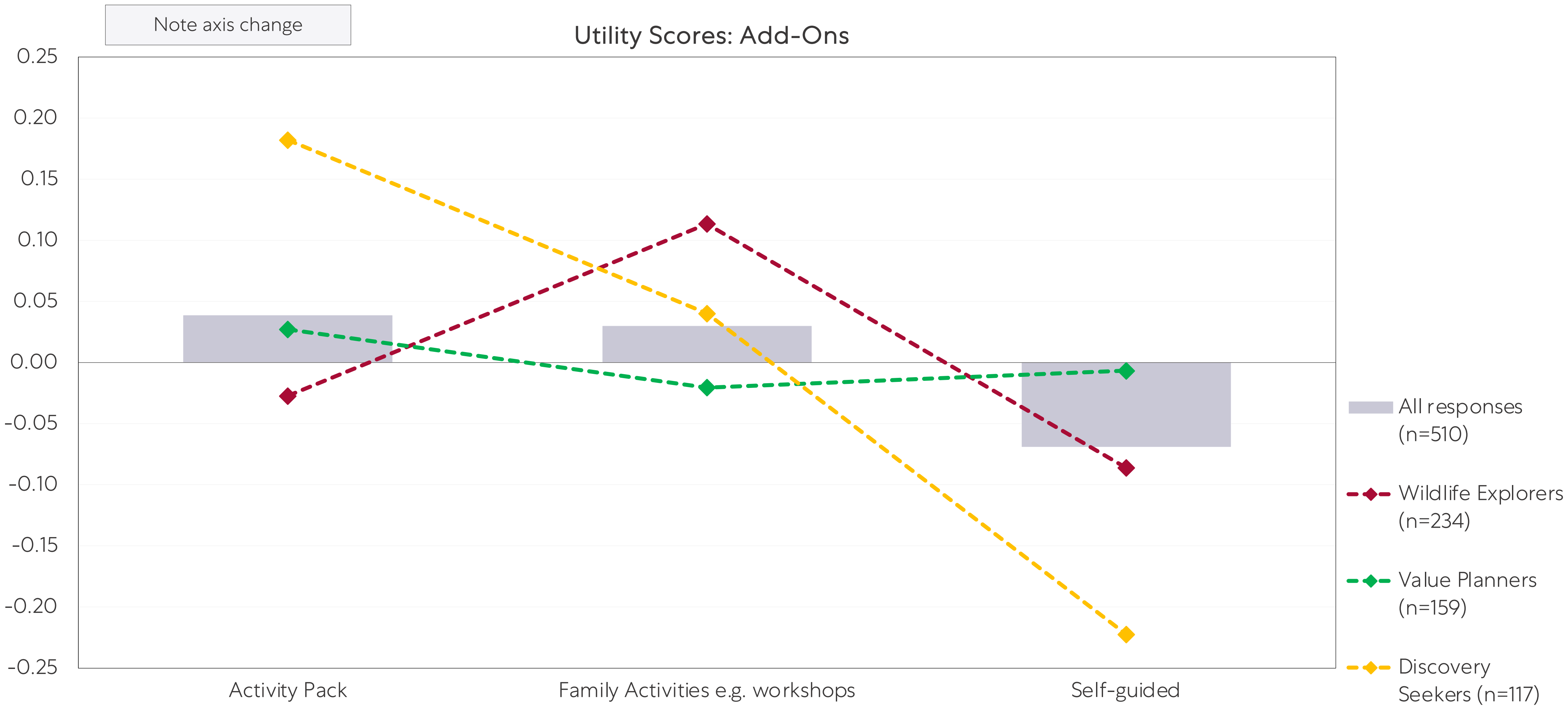
In each chart, you will see bars showing the utility score for all responses. Layered on top are lines which show the separate preferences for each of our three key market segments.



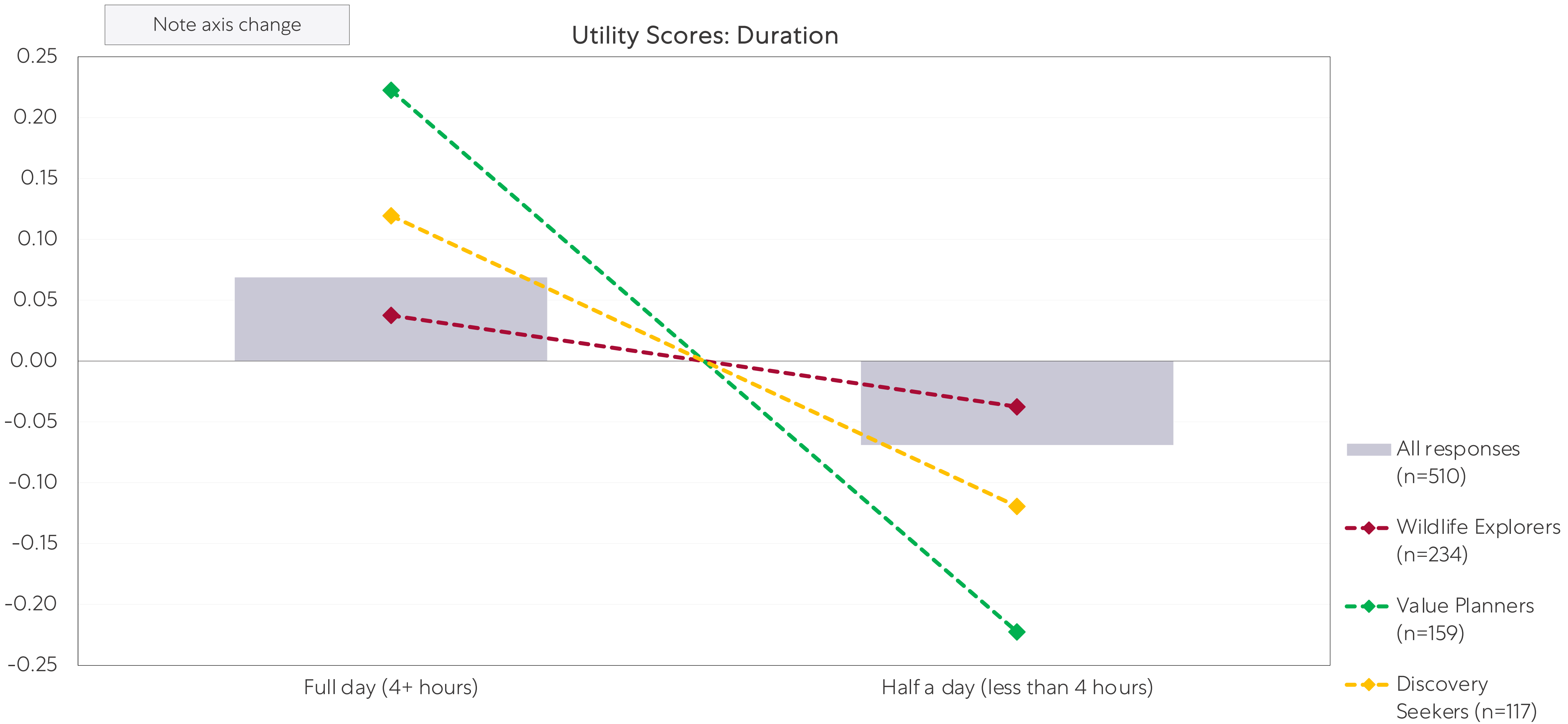
Wildlife is the most preferred type of day out for all segments, although Discovery Seekers are equally interested in Science & Nature



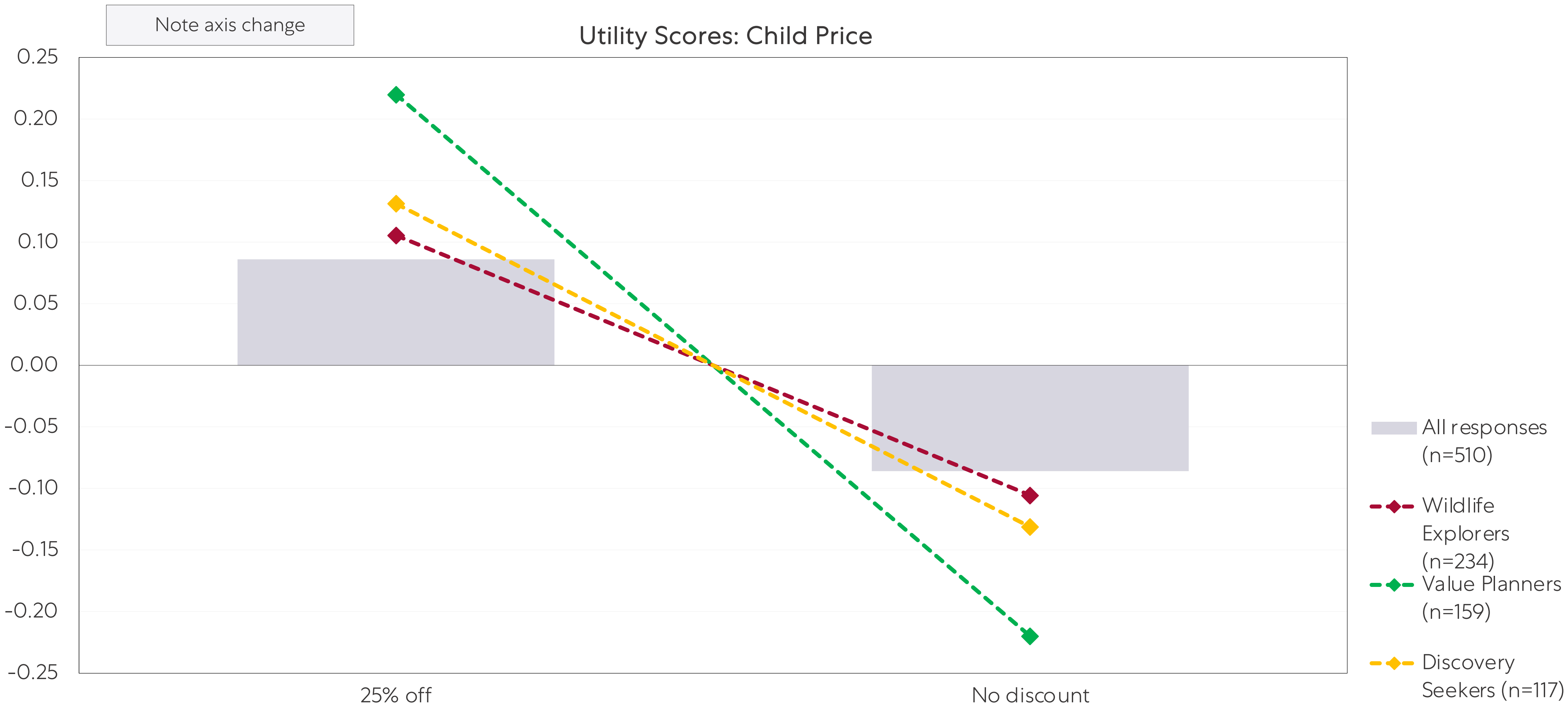
Discovery Seekers, who form 22% of our key market segments, prefer an activity pack for exploring with. Wildlife Explorers (45% of our segments) are more interested in activities and workshops.



Value Planners, who are 32% of our market segments, tend to equate a longer day with higher value - more so than the other two segments. There is a consistent preference to full days out.



Value Planners, who are 32% of our market segments, are more motivated by a 25% child discount than the other segments



ALVA Association of Leading Visitor Attractions

Explainer: Price Elasticity of Demand

Price elasticity of demand measures how sensitive visitors' purchasing decisions are not only to specific price points, but also to the magnitude of changes in price.

If demand is highly 'elastic,' a small price change leads to a large change in sales. If it's 'inelastic,' sales are relatively stable even with price changes.

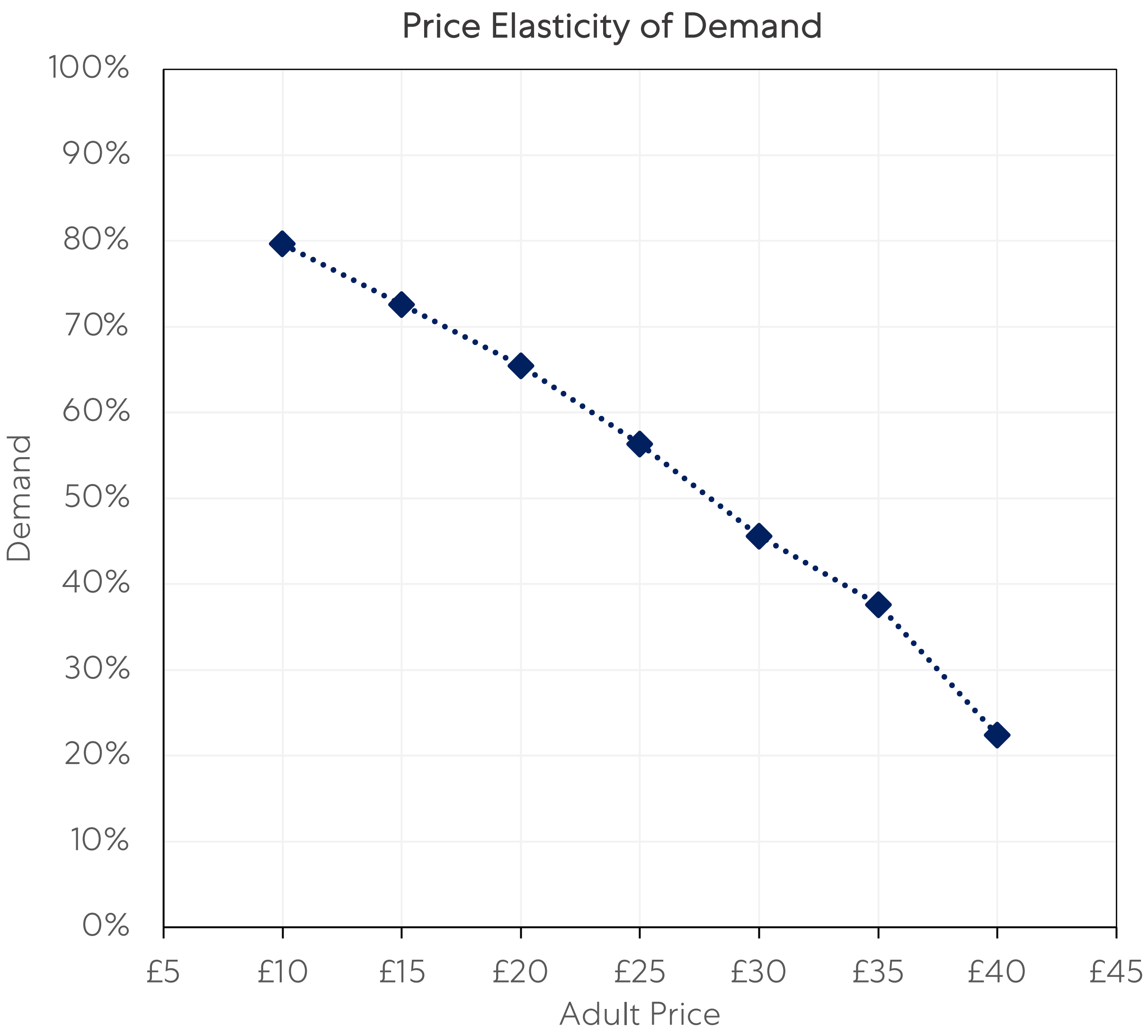
In the following charts, we calculate how much demand will be lost (how many fewer tickets would be sold) for each £5 increase in price.

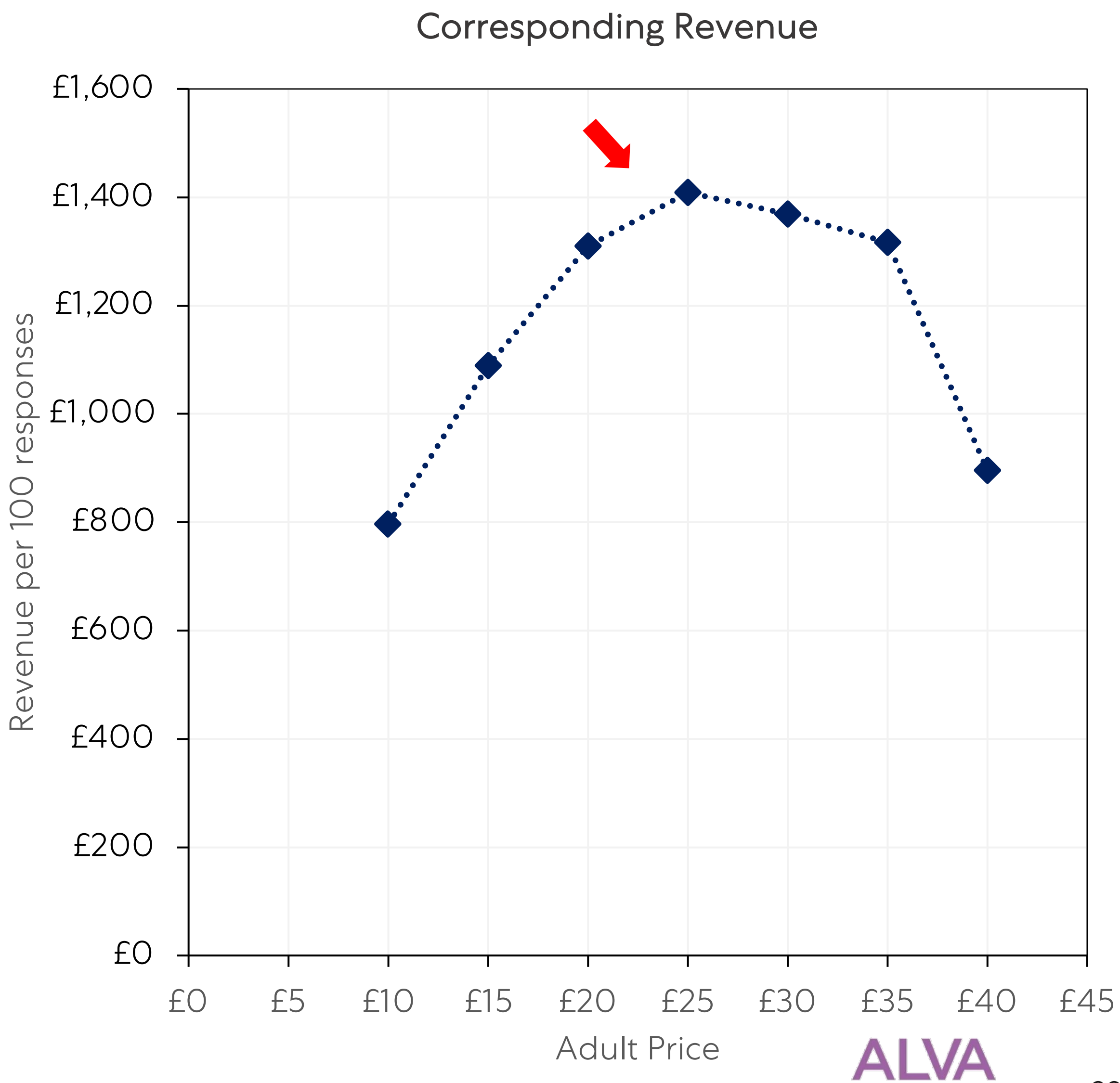
This is shown by the downward-sloping demand curves.

Key findings:

- Value Planners are highly "elastic" (very price-sensitive), losing interest quickly after £10
- Wildlife Explorers are more "inelastic" (less price-sensitive), still showing reasonable demand even at higher prices.
- Understanding these differences helps to set prices that maximise both visitor numbers and revenue – in this data £25 emerges as an optimal price point for adults, balancing good attendance / visitor volume with income.
- Individual attractions may price differently for different visitor segments based on their varying sensitivities to price increases.

Price elasticity of demand drops consistently with each £5 increase in price, with a drop off after £35. The optimal adult price point balancing volume and income is £25.





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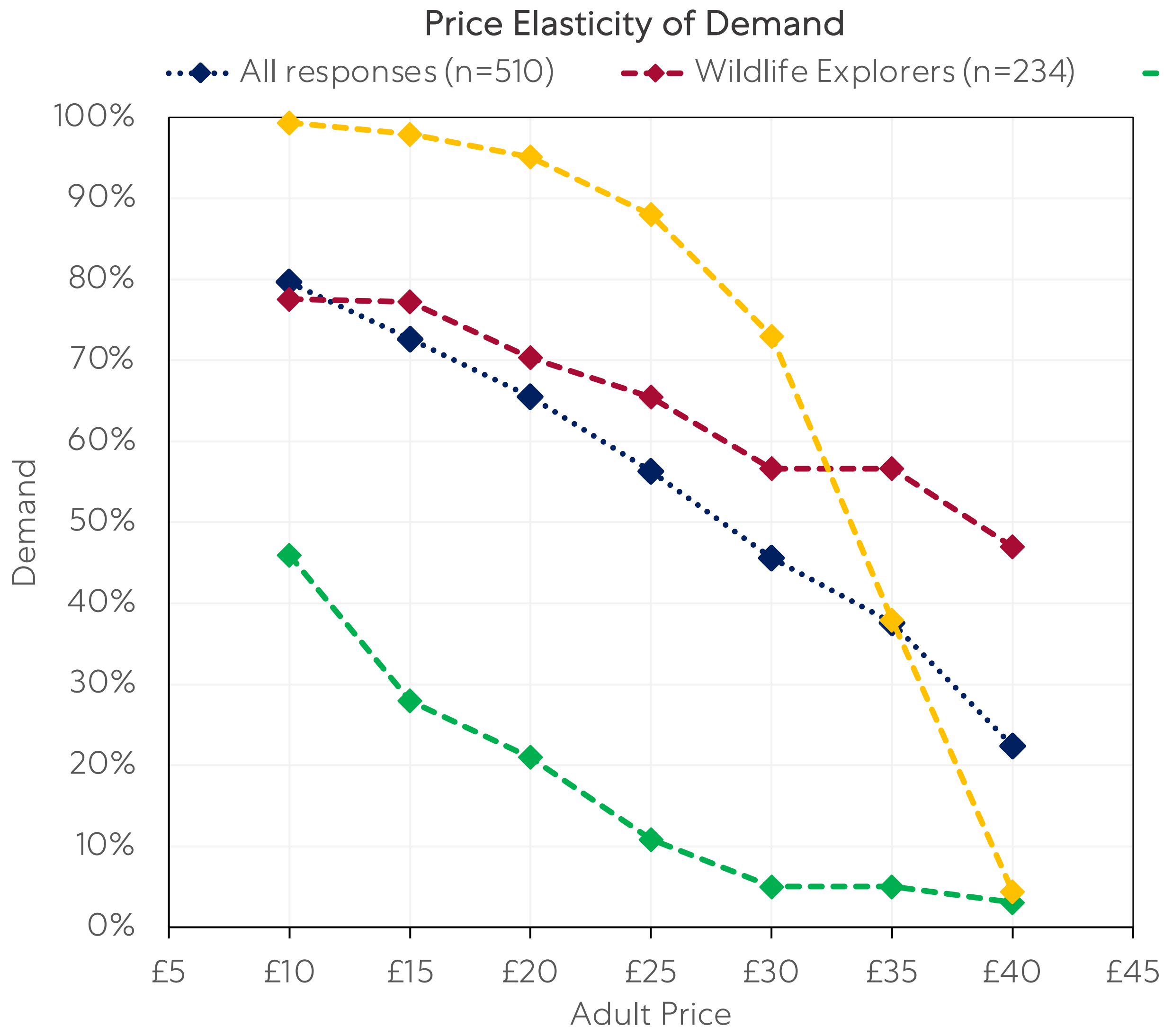
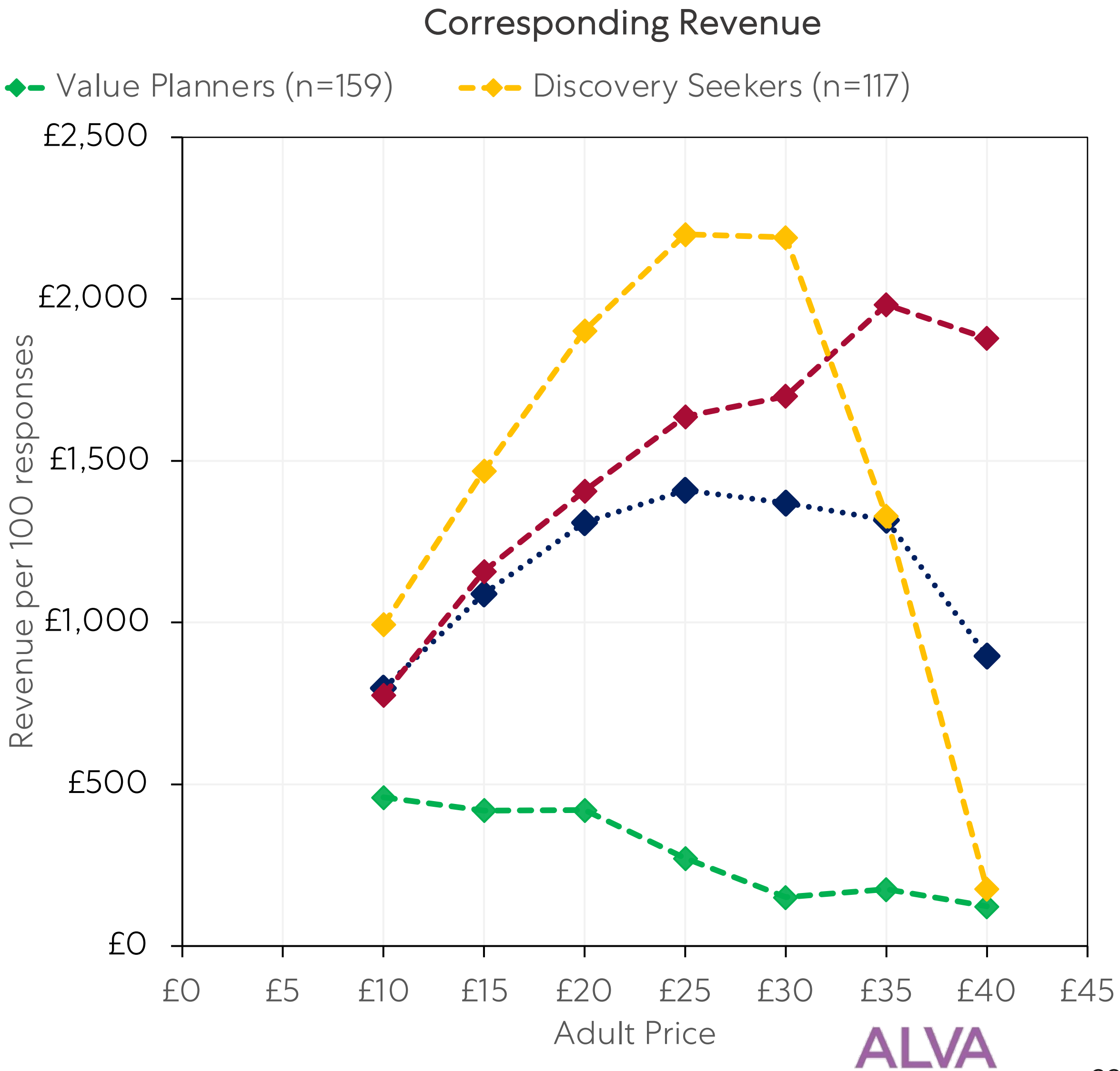
Breaking down further by segment, we can see how Wildlife Explorers are the least price sensitive, with Discovery Seekers showing a deep drop off at £30 and Value Planners dropping quickly after £10





What are families going to?

Understanding real visits

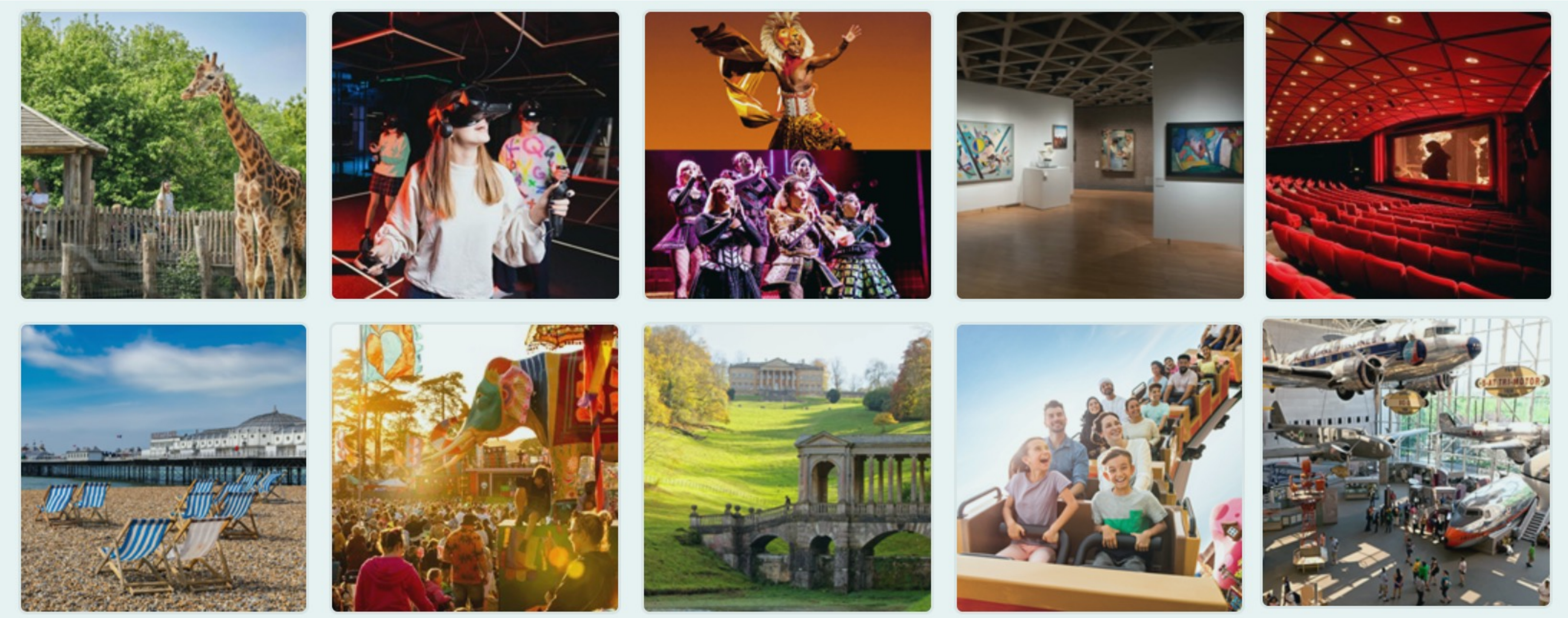
- We asked families what they like to do in different ways. The first was by asking them to pick their top 3 choices, and the second was to ask them about how frequently they visited different attractions.

- Families combine free and paid attractions throughout the year. When choosing their ideal days out, families favour settings such as zoos, beaches and theme parks. This preference pattern reflects how families view different attractions as complementary rather than competing options, with each serving different needs and occasions.

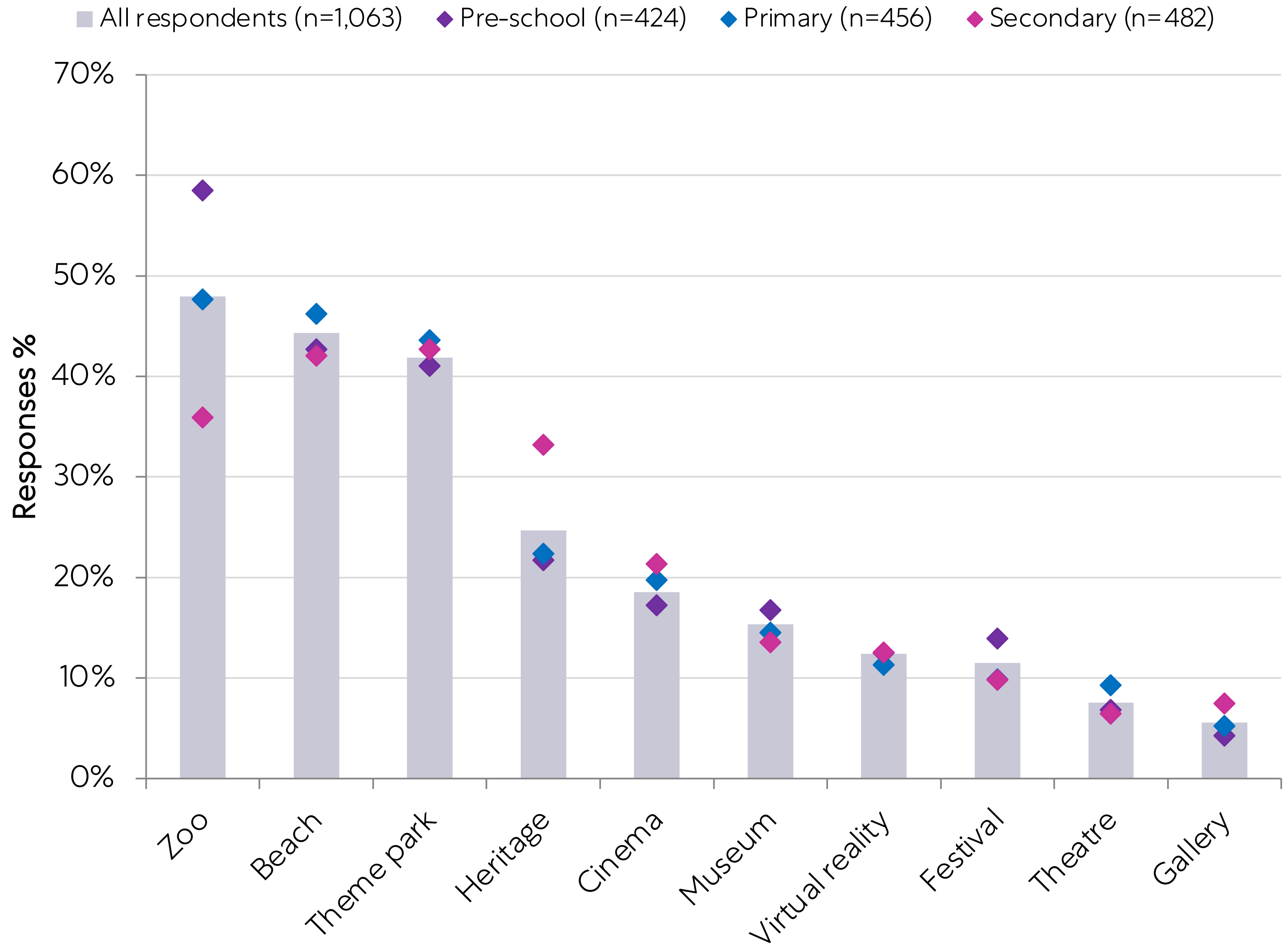
Key findings:

- Families successfully balance free and paid attractions throughout the year
- Top 3 ideal family days out: Zoo, Beach, Theme Park
- 90%+ of families visit free outdoor spaces (beaches, walks) at least once yearly
- 80%+ use local activities (parks, libraries, swimming) at least once yearly
- 70% visit cinemas at least once yearly
- 60% visit petting zoos/family farms at least once yearly
- 50-60% visit theme parks and zoos at least once yearly
    - Zoos and heritage settings tie for 3rd place among families with secondary school children
- Premium attractions serve as special occasion destinations
- Visit patterns suggest memberships help make paid attractions more accessible

Which images best represent your ideal family day out?



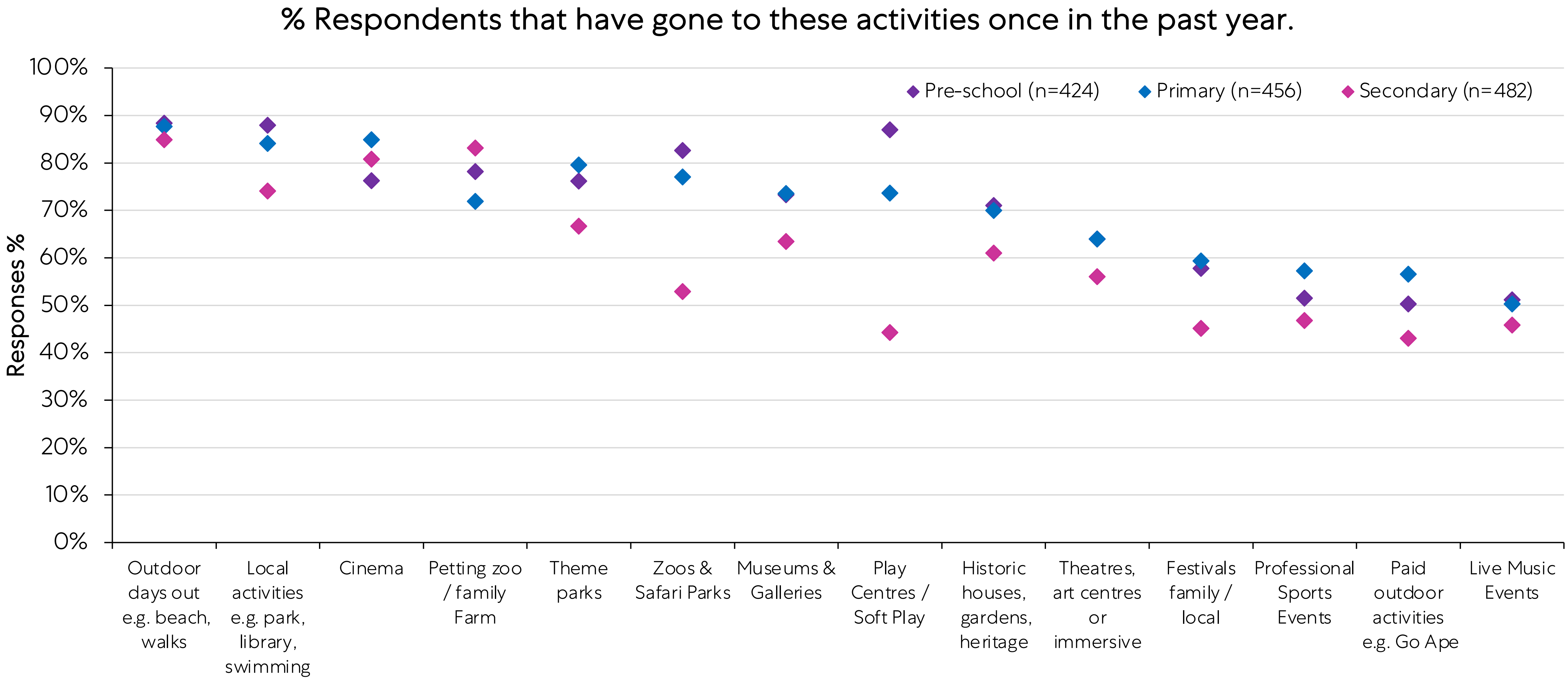
Which images best represent your ideal family day out?



- Overall, the top 3 family days out by some margin were Zoo, Beach and Theme Park.
- Note however families with secondary school kids have Zoo and Heritage in third place together.
- It is notable that given a free choice, 2 of the more traditionally expensive options offered were picked.

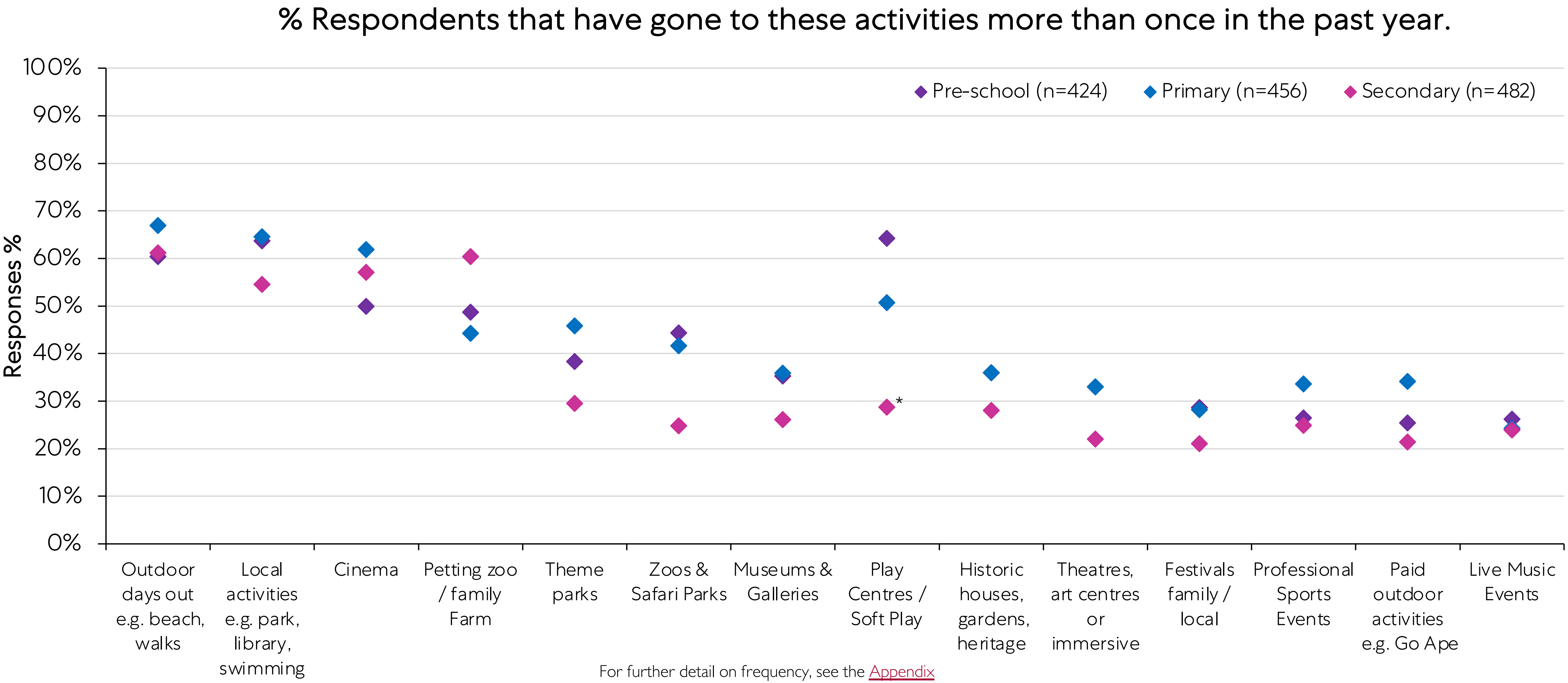
We asked which settings respondents have attended once in the past year.

The top activities for all age groups are generally free or low price. Zoos and theme parks tend to frame themselves in marketing as treat activities.



For further detail on frequency, see the Appendix

Free and low-cost activities dominate family outings across all age groups with repeat attendance at paid attractions potentially driven by membership



For further detail on frequency, see the Appendix

* This figure likely reflects family outings where a younger sibling is present, as play centres primarily cater to younger age groups, and secondary school-aged children would typically be accompanying family members rather than actively participating in the soft play itself.

We invited respondents to agree or disagree with a range of pre-prepared statements about what is important when choosing to visit or re-visit an attraction or location.

Key findings:

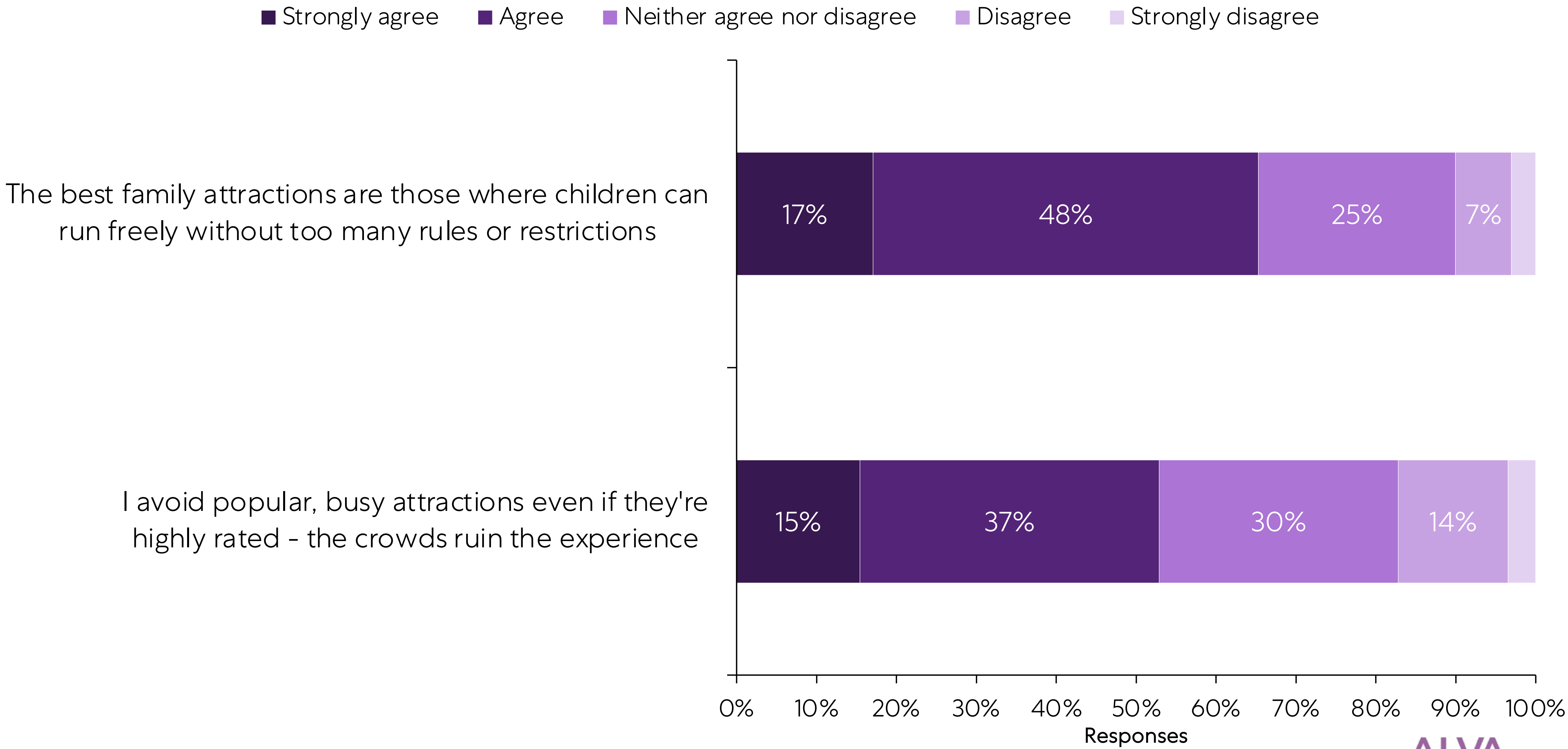
- Adults say they want:
  - Somewhere they feel their children can run freely
  - Places (or times) that don't feel too busy
  - Attractions that are affordable, age appropriate and child-friendly.

- Children, perhaps unsurprisingly, say they want fun, and excitement!

When making decisions, adults tend to lead the charge but (particularly older) children do have a voice in deciding where to visit, and when deciding on whether to return to an attraction.

How much do you agree with the following statements?

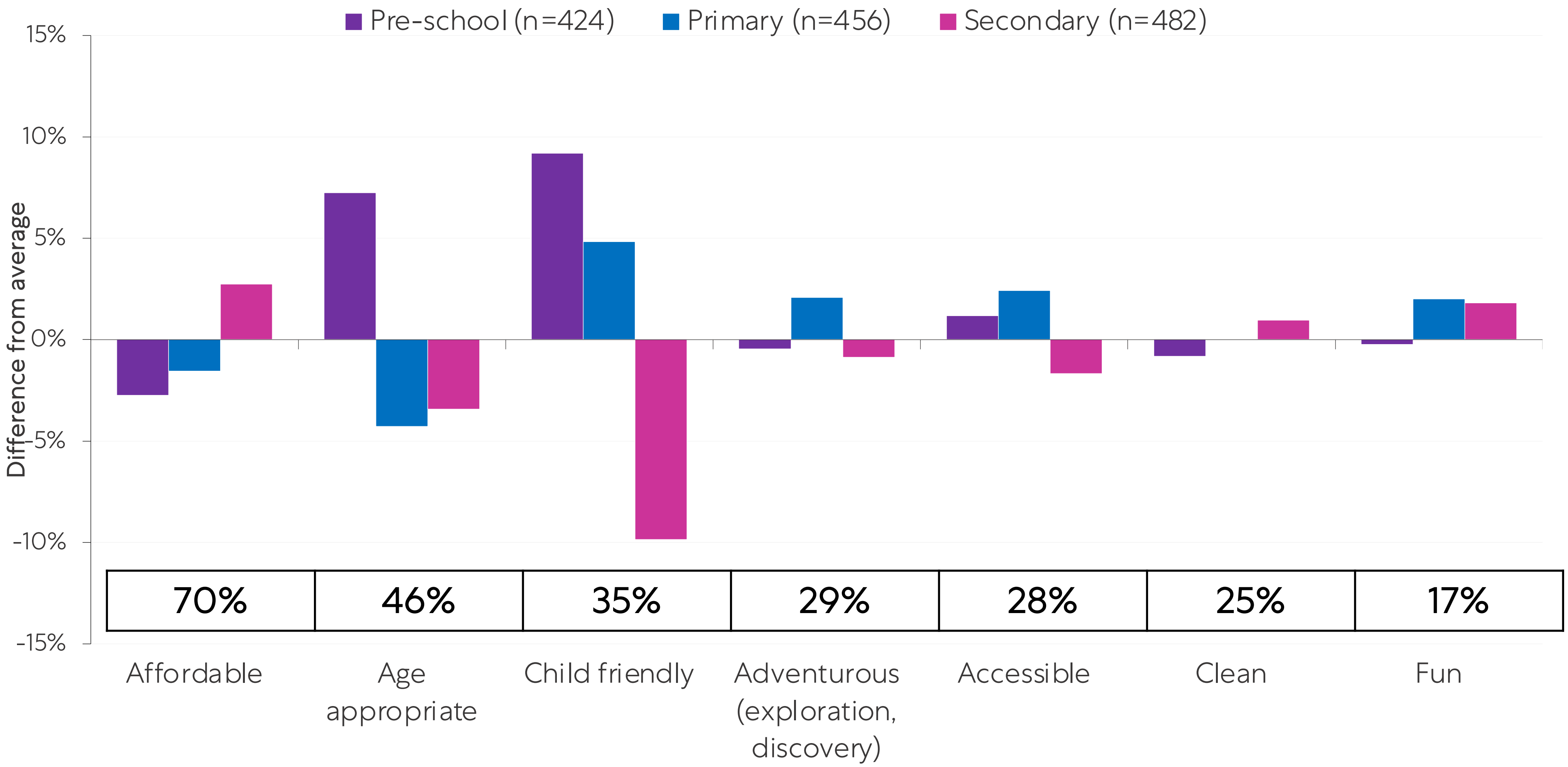
Over half indicated a preference for spacious, less busy settings



n=1,063

Respondents were asked to choose five words which best describe what they're looking for in a family experience, from a list.

The seven top preferences are shown below. In particular, for younger children, families seek clear reassurance / confirmation that a setting is child-friendly and for very young children that it is age-appropriate.



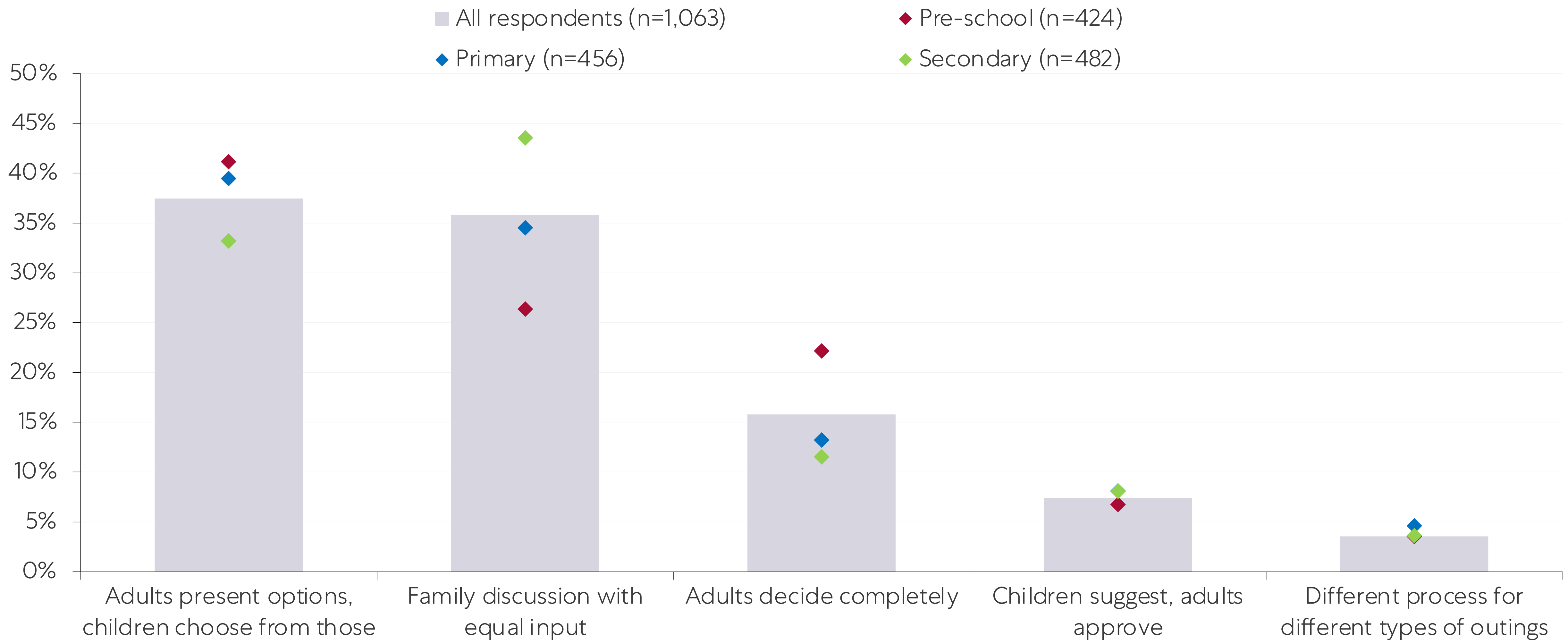
The percentages at the bottom of this chart show the percentage total of respondents who chose each option.

The "difference from average" bars show how much the preference for each option deviates above or below the norm, depending on the age of children in the family.

Planning a family visit

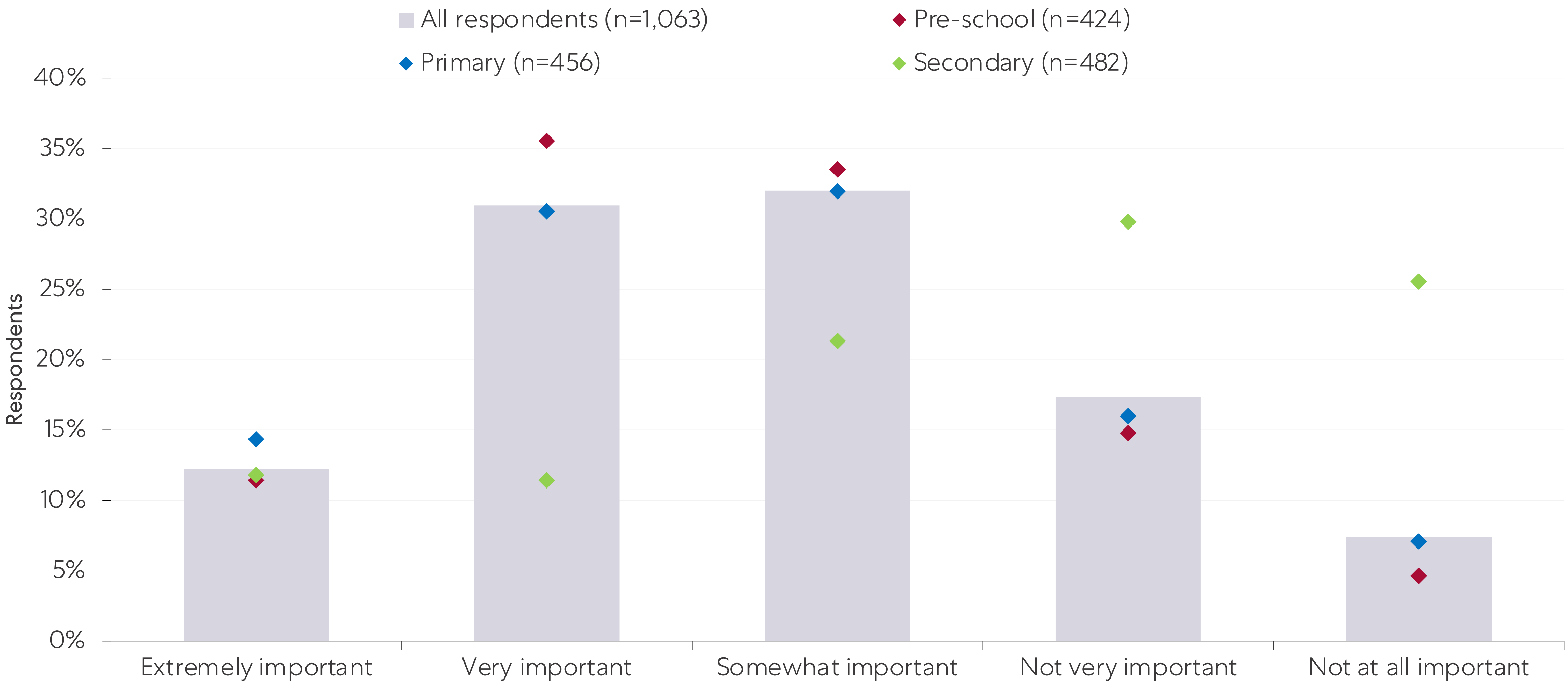
How do you decide which attraction to visit for a day out?

To better understand the potential implications for tone of voice in marketing, we wanted to understand some of the earliest impetus for planning a day out – who suggests the idea and how is a destination agreed?



How important is it that family activities connect to topics your children are learning about in school?

The importance of connection to the school curriculum reduces as children get older.



What three words would your children use to describe their ideal day out?

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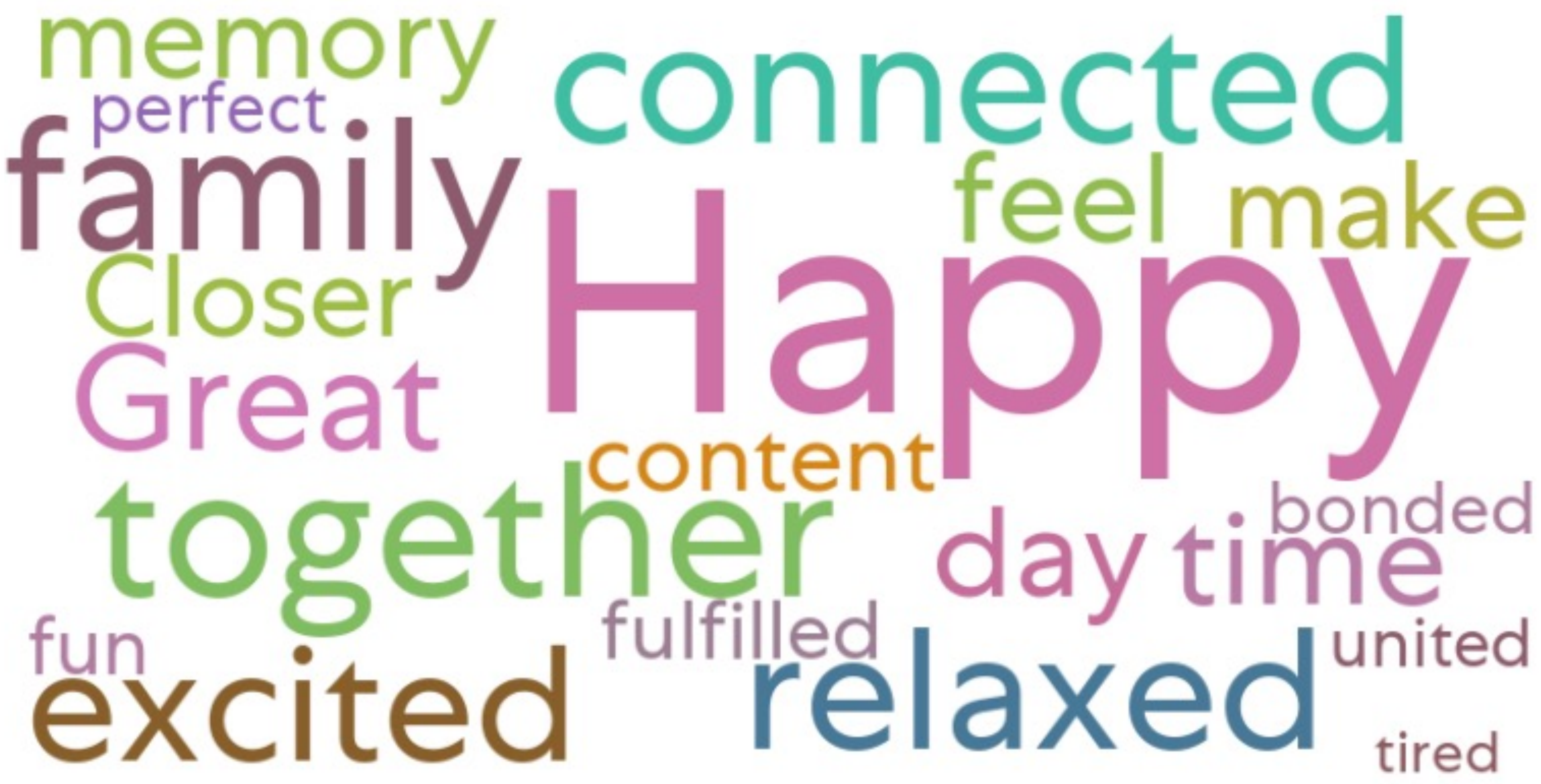
Complete this sentence: "A perfect family day out makes us feel..."



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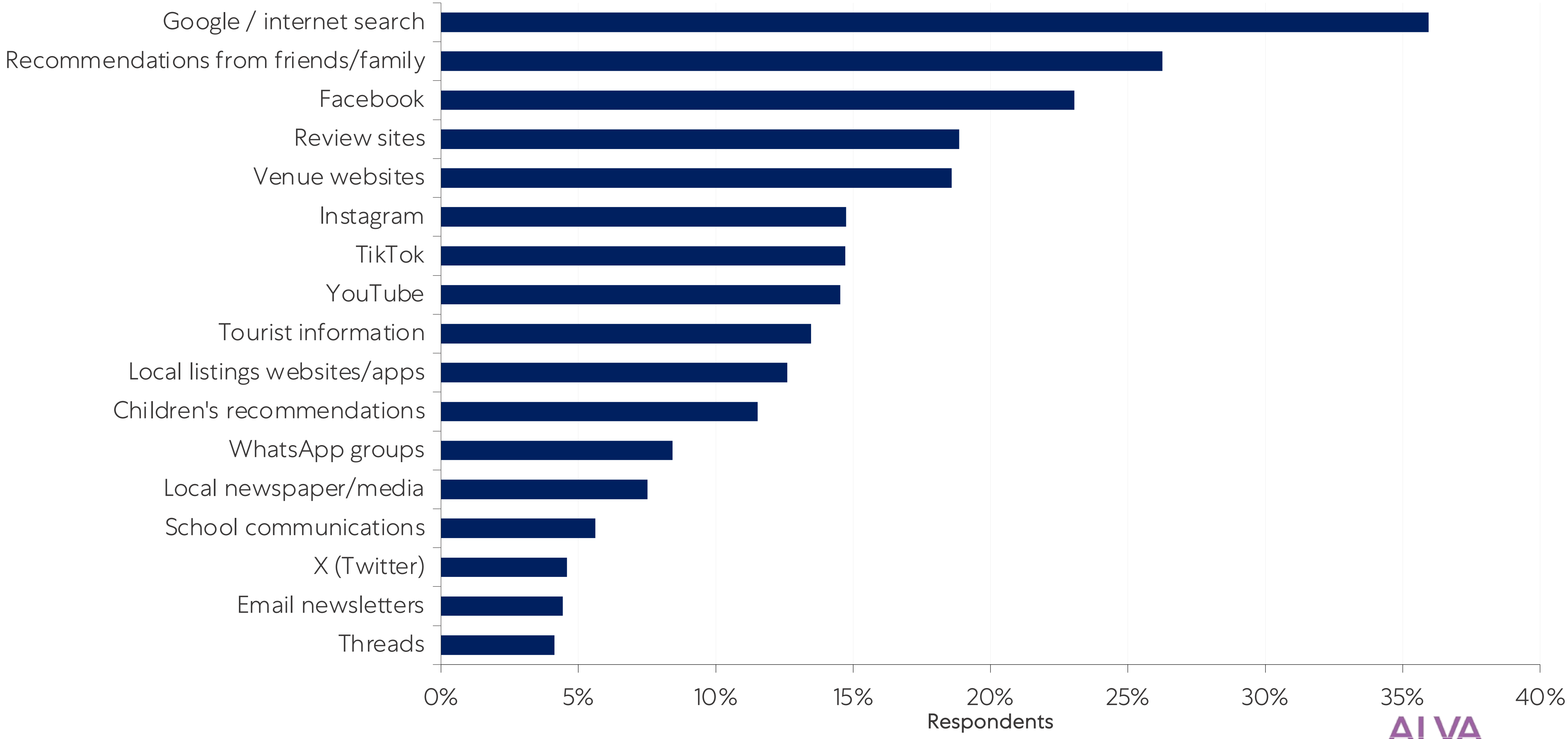
How families research and book

- Google (36%) and Facebook (23%) are the key platforms, as well as word of mouth (26%) and review sites (19%).
  - This further emphasises the importance of Meta as a digital advertising platform, and Google for both advertising and search-engine optimisation. AI / Large-Language Model is still relatively speaking in its infancy for planning, but we anticipate this may grow significantly in the coming years.

- 49% said they start researching days out more than two weeks before they visit, but a significant proportion convert much later, with 44% of bookings happening in the 48 hours before visit.
  - This identifies two distinct booking horizons for awareness and interest, with later conversion.

Where do you typically discover ideas for family activities? (Select top 3)



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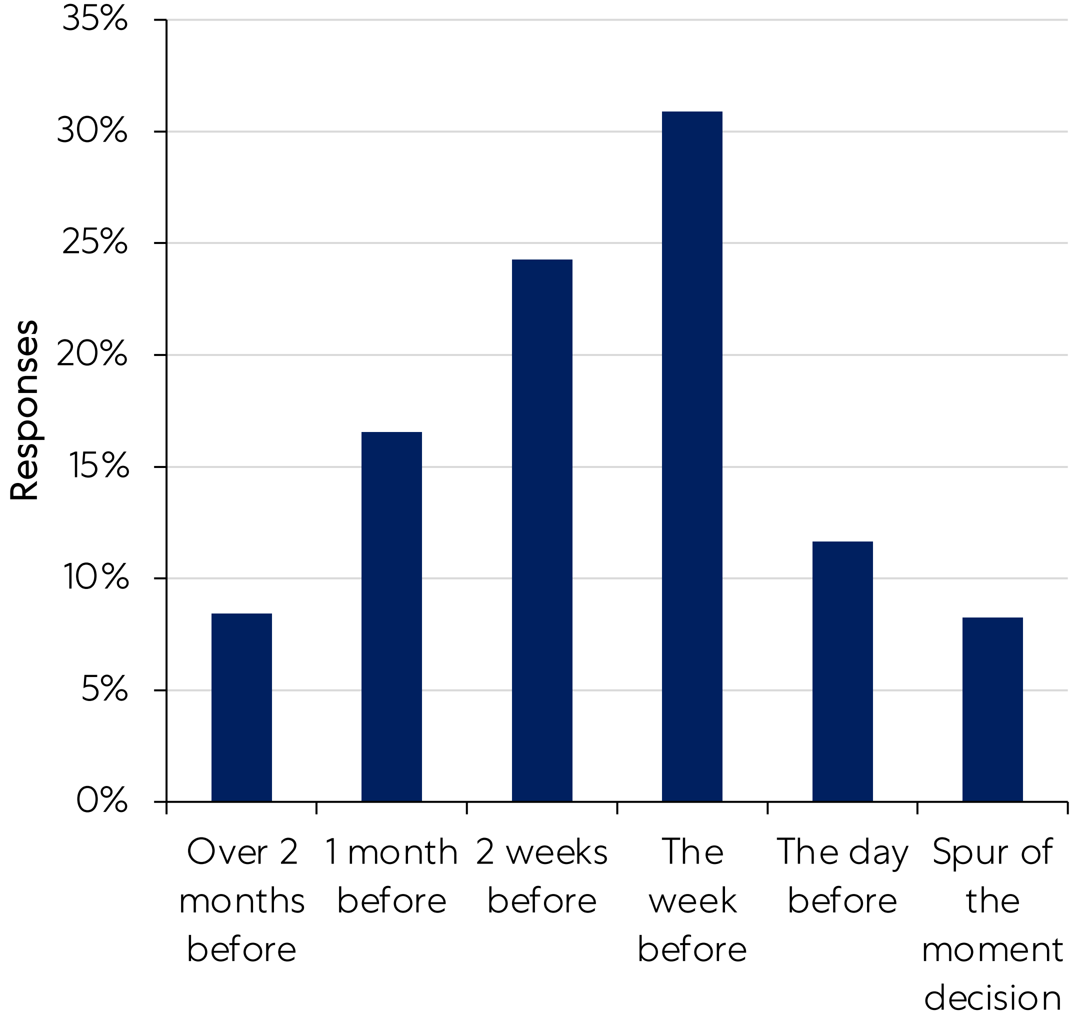
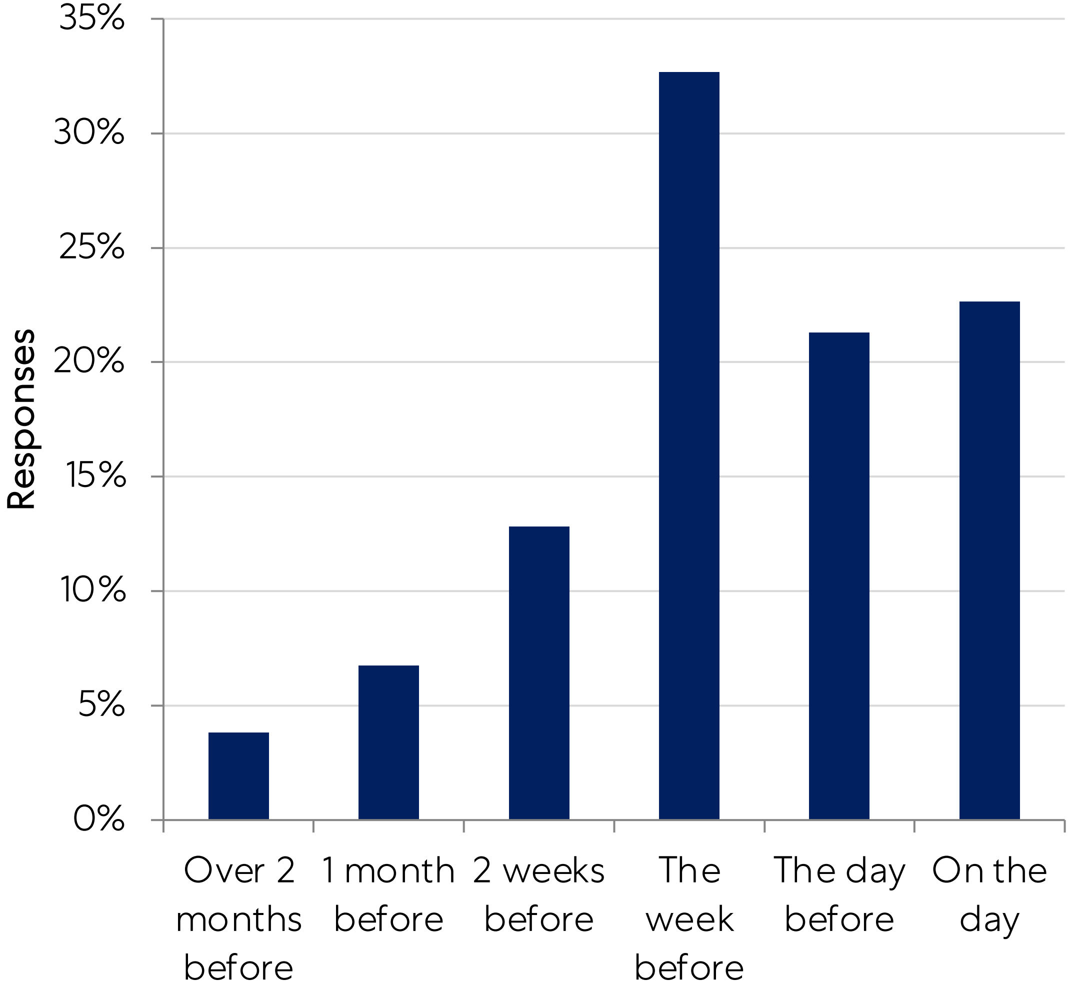
49% respondents start researching for a day out 2+ weeks in advance, while 44% book within 48 hours.

When do you typically start researching for a day out?



When do you typically book for a day out?



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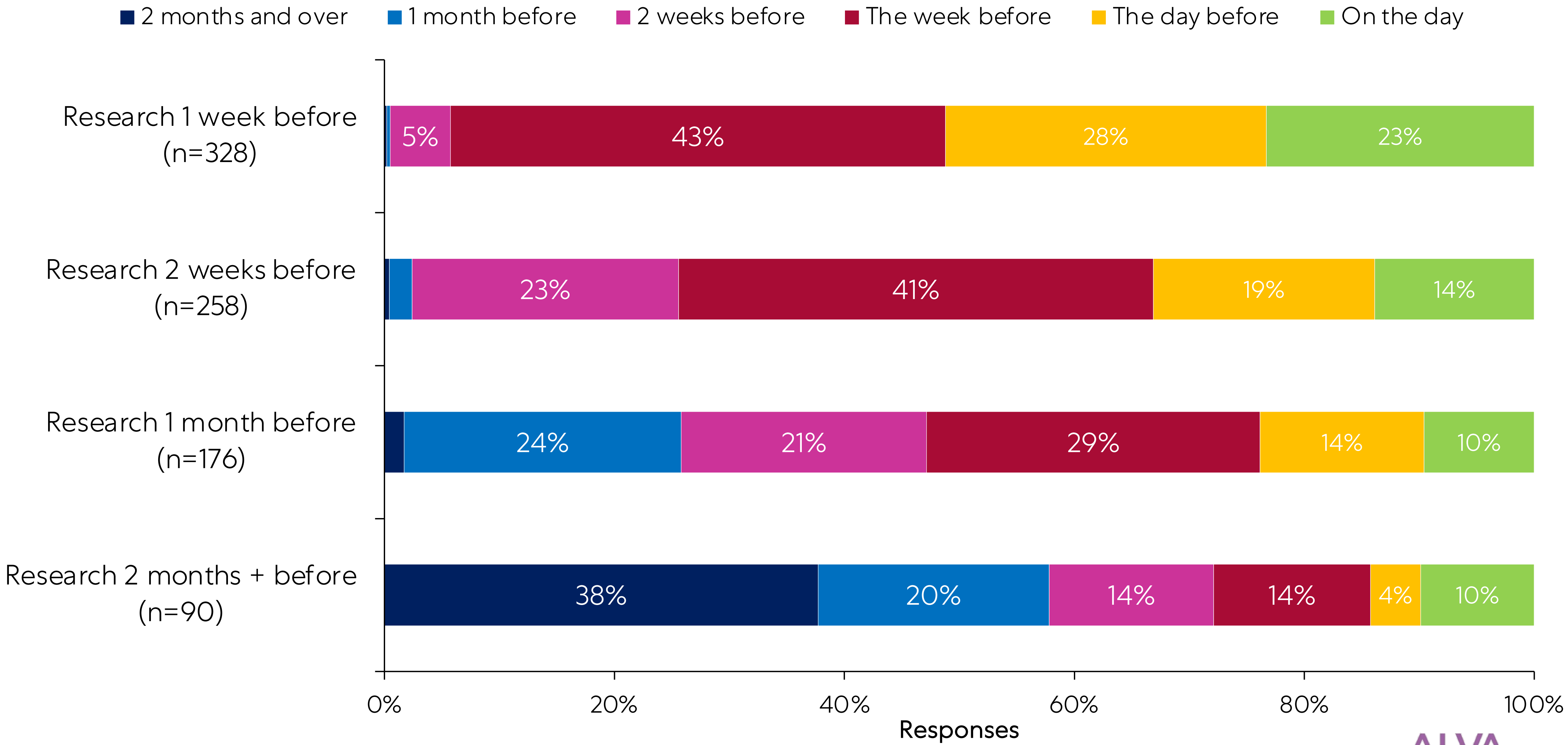
When do families buy their tickets, split by when they research their days out



Must-have information for families:

- Clear prices
- Reviews from other families
- Photos of the attraction (ideally with families enjoying the space)
- Information about facilities
- Details about suitable age ranges

The top five reasons to return:

1. Free entry day
2. Children specifically asking to return
3. Positive memories from previous visit
4. Good weather
5. Special offers or discounts for return visits

The importance of rapid or well-timed campaigns on good weather days is important to highlight – can you tap into or trigger the other reasons, early on a good weather day?

Motivation and information

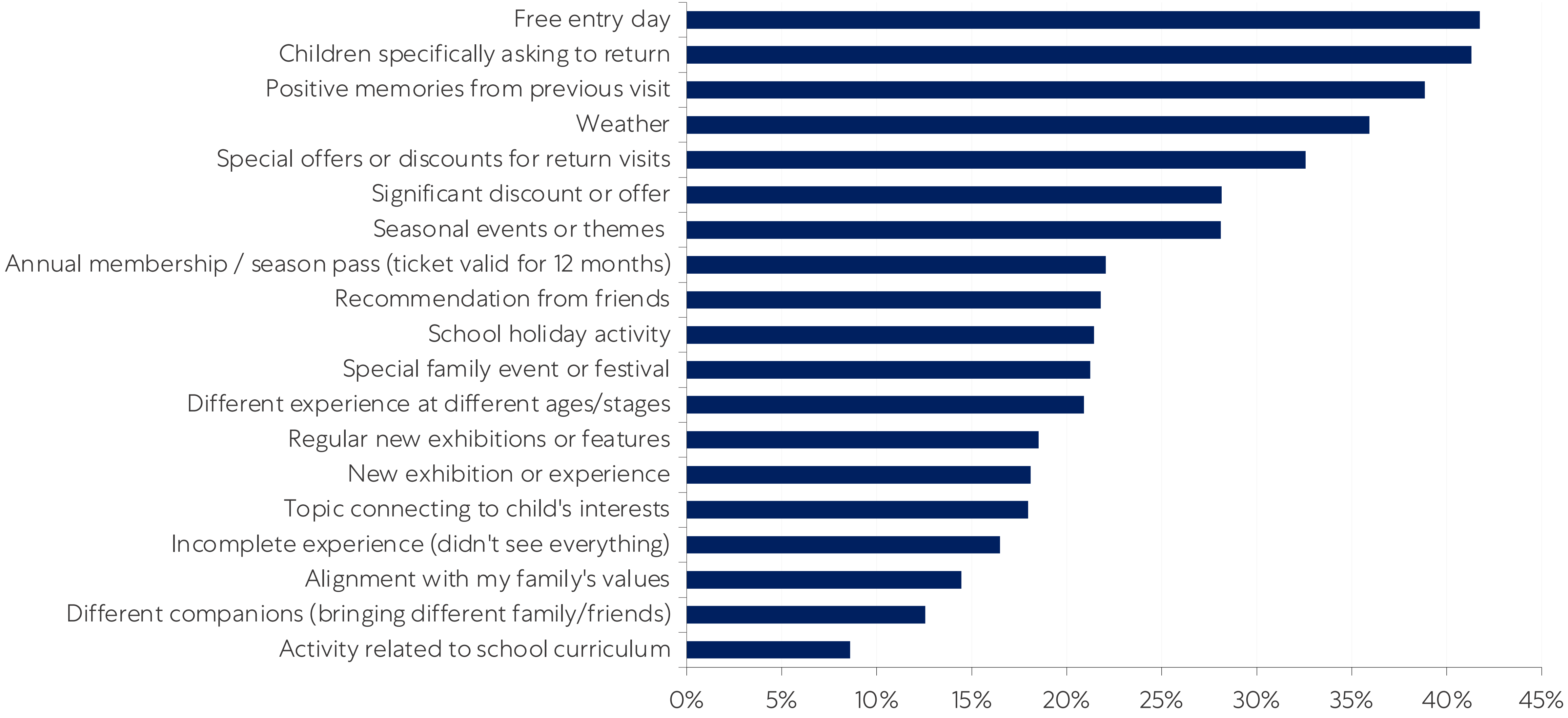
We asked respondents what would make them most likely to visit an attraction in the next month, and what information is most important when deciding whether or not to visit an attraction.

The following pages reveal the top responses.

Key findings:

- Reasons for visiting:
  - Free entry day
  - Children specifically asking to return
  - Positive memories from previous visit
  - Good weather
  - Special offers or discounts for return visits
- Key information:
  - Clear prices
  - Reviews from other families
  - Photos of the attraction (ideally with families enjoying the space)
  - Information about facilities
  - Details about suitable age ranges

What would make you MOST likely to visit an attraction in the next month? (Select up to 3)



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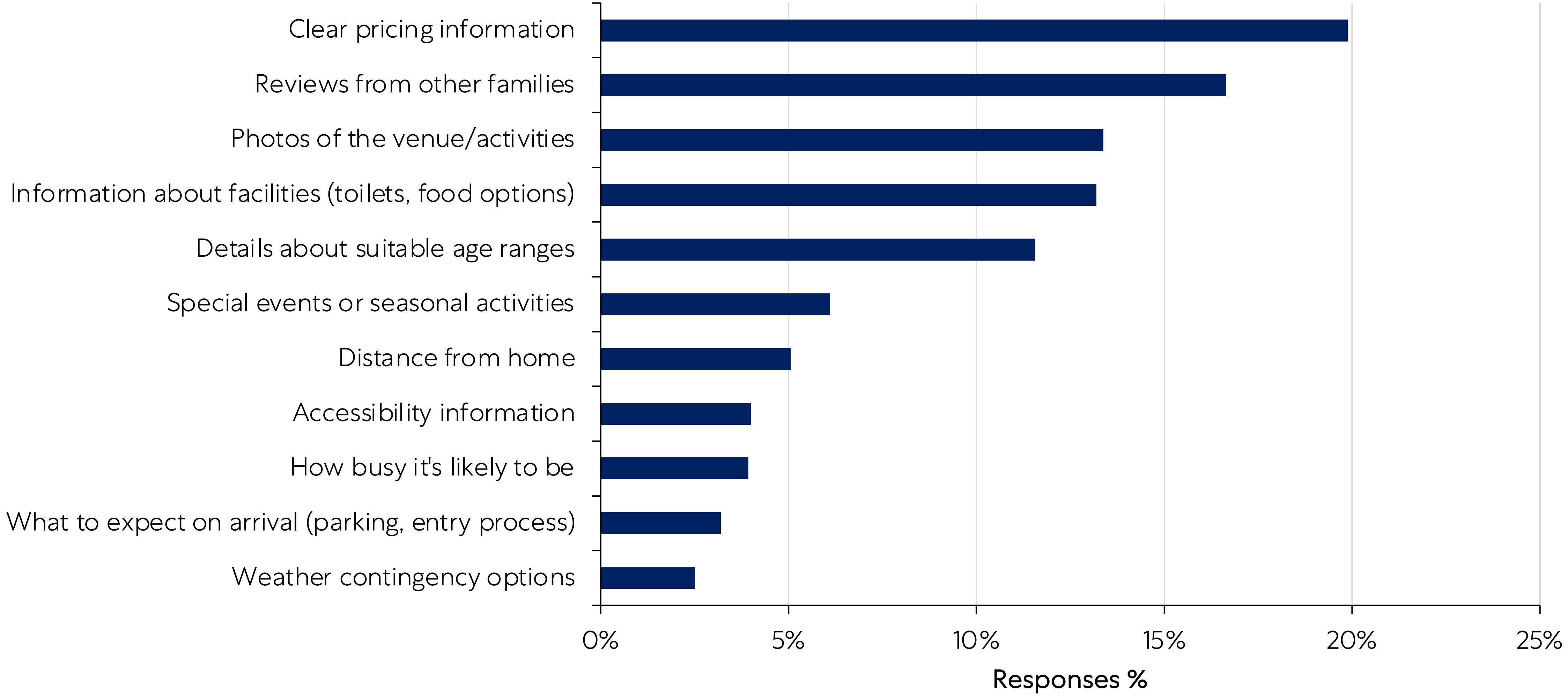
What information is MOST important when deciding whether to visit an attraction?



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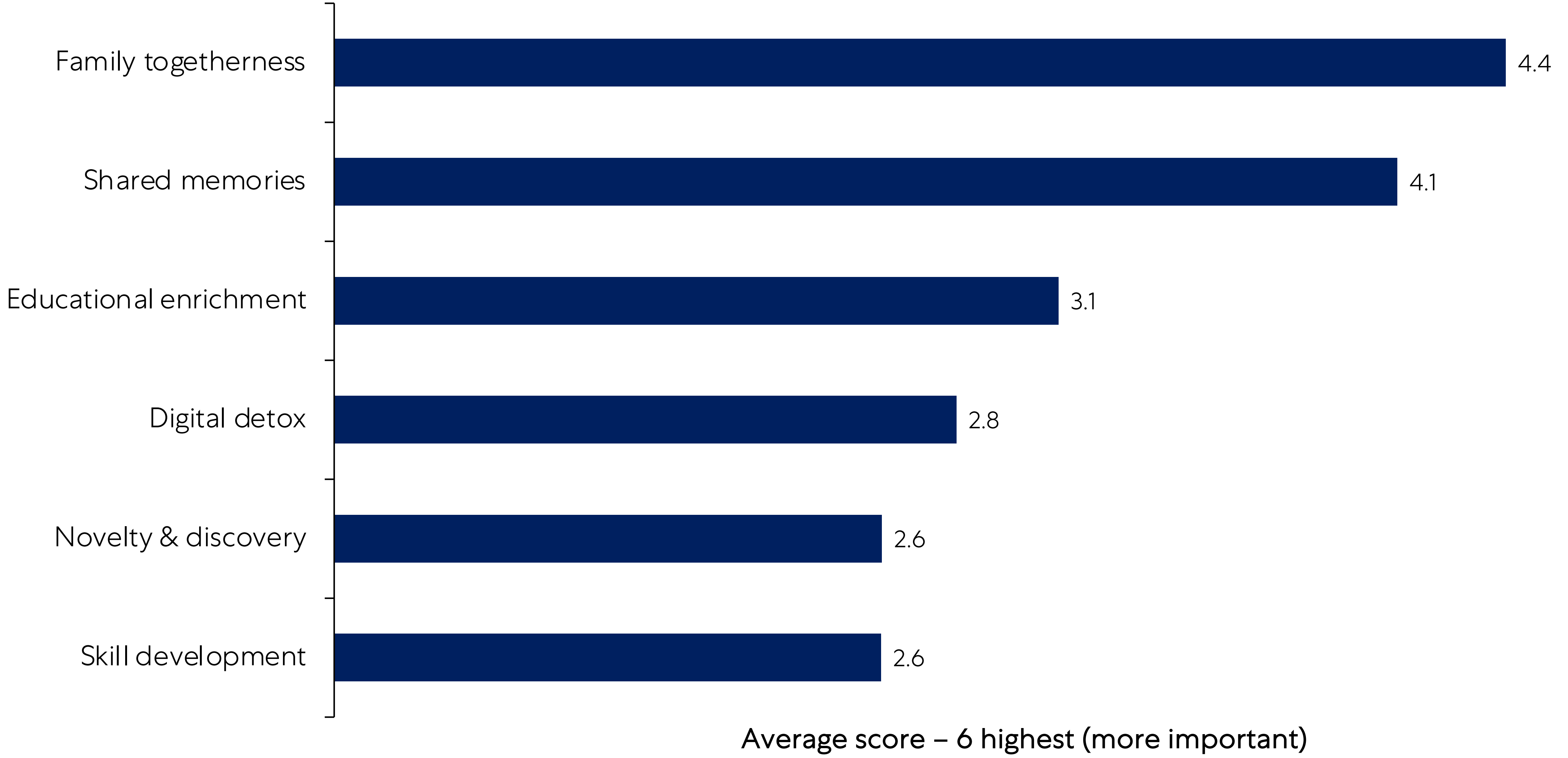
Please rank the following aspects of a family day out in order of importance to your family



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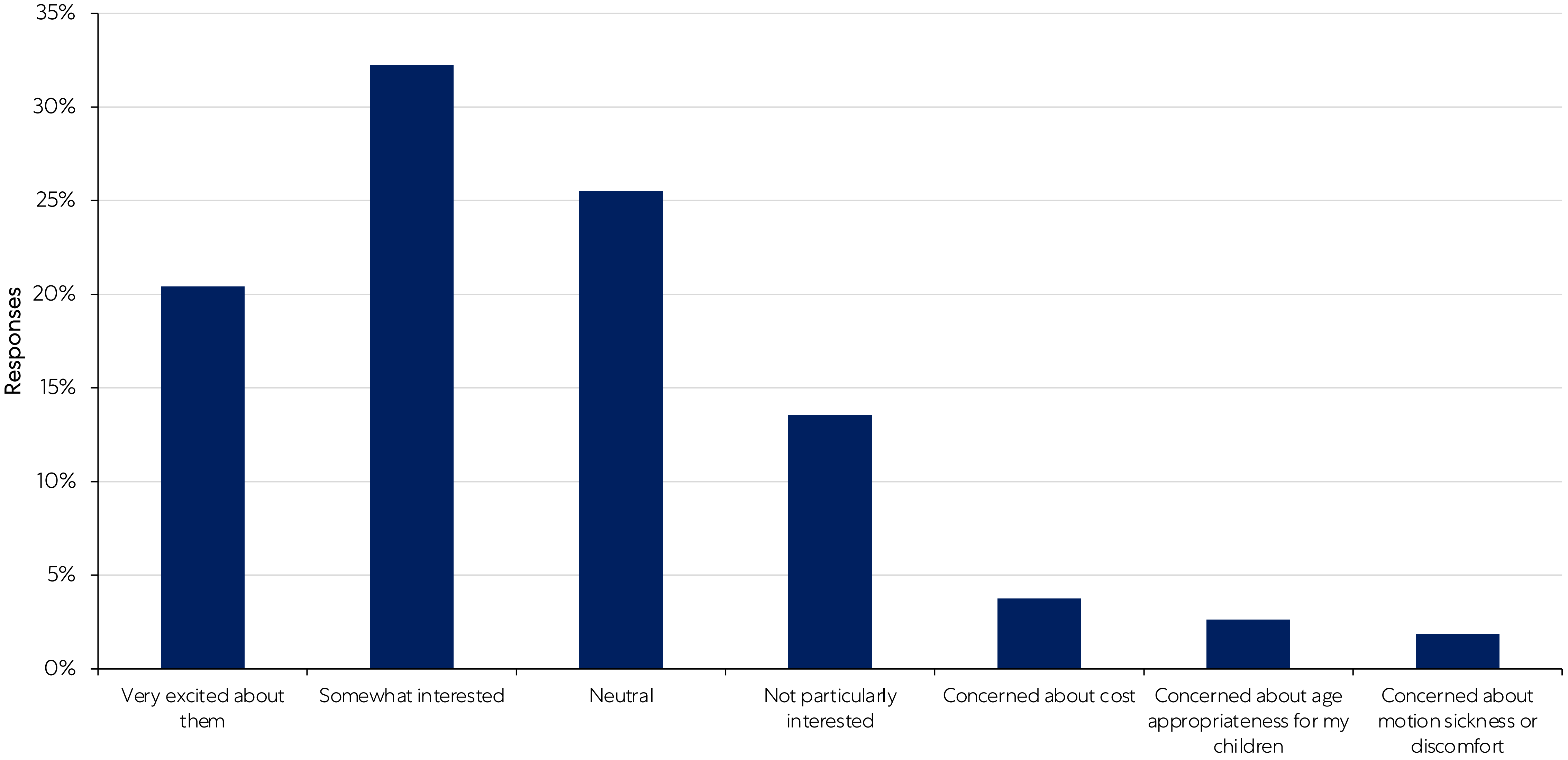
How do you feel about Virtual Reality and Augmented Reality experiences?



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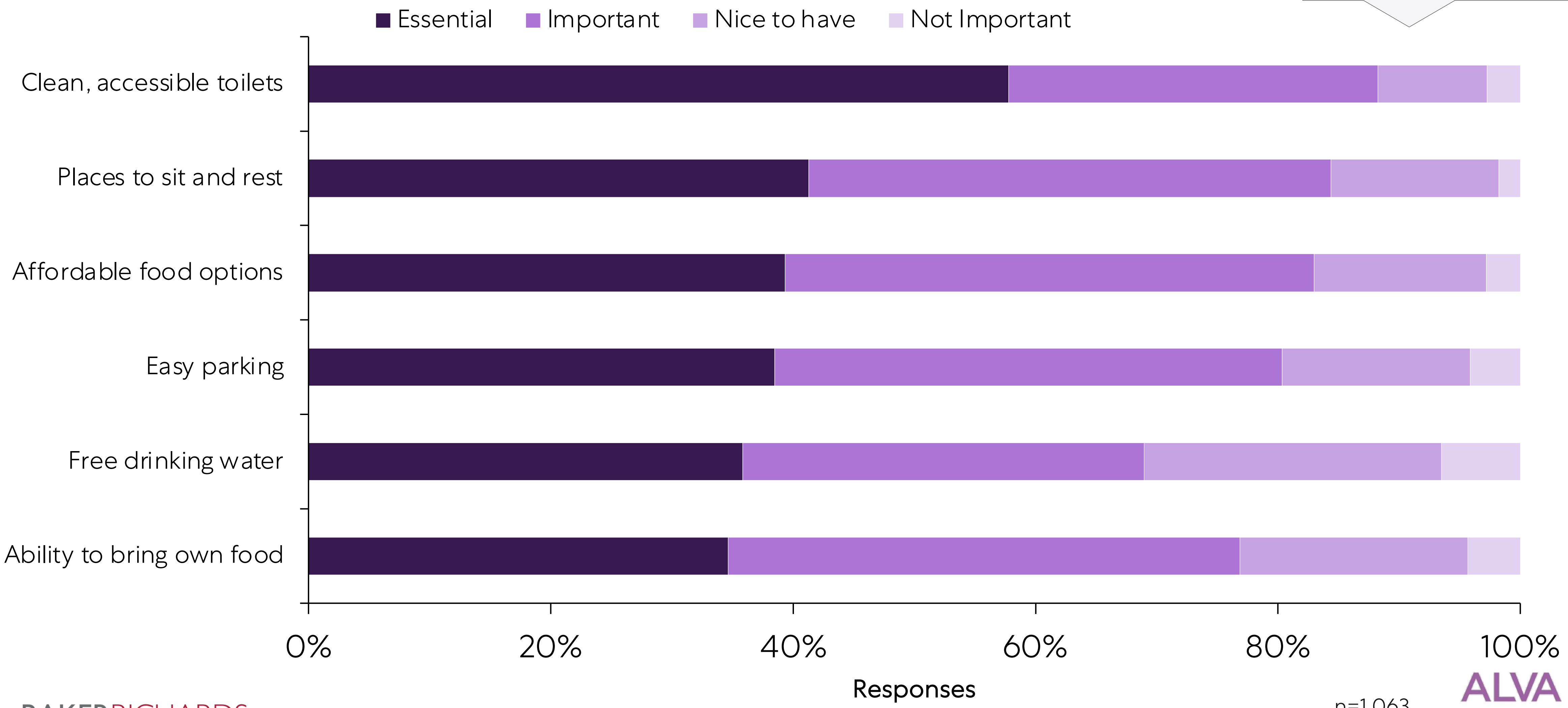
Thinking about the last few times you considered a family day out to an attraction but chose something else - what types of activities do you choose INSTEAD OF visiting attractions, and why?

n=1,014

On-site facilities and the visitor experience

Thinking about facilities, how important are the following?

Pre-school families: 70% find buggy access important/essential. 77% find baby changing facilities important / essential



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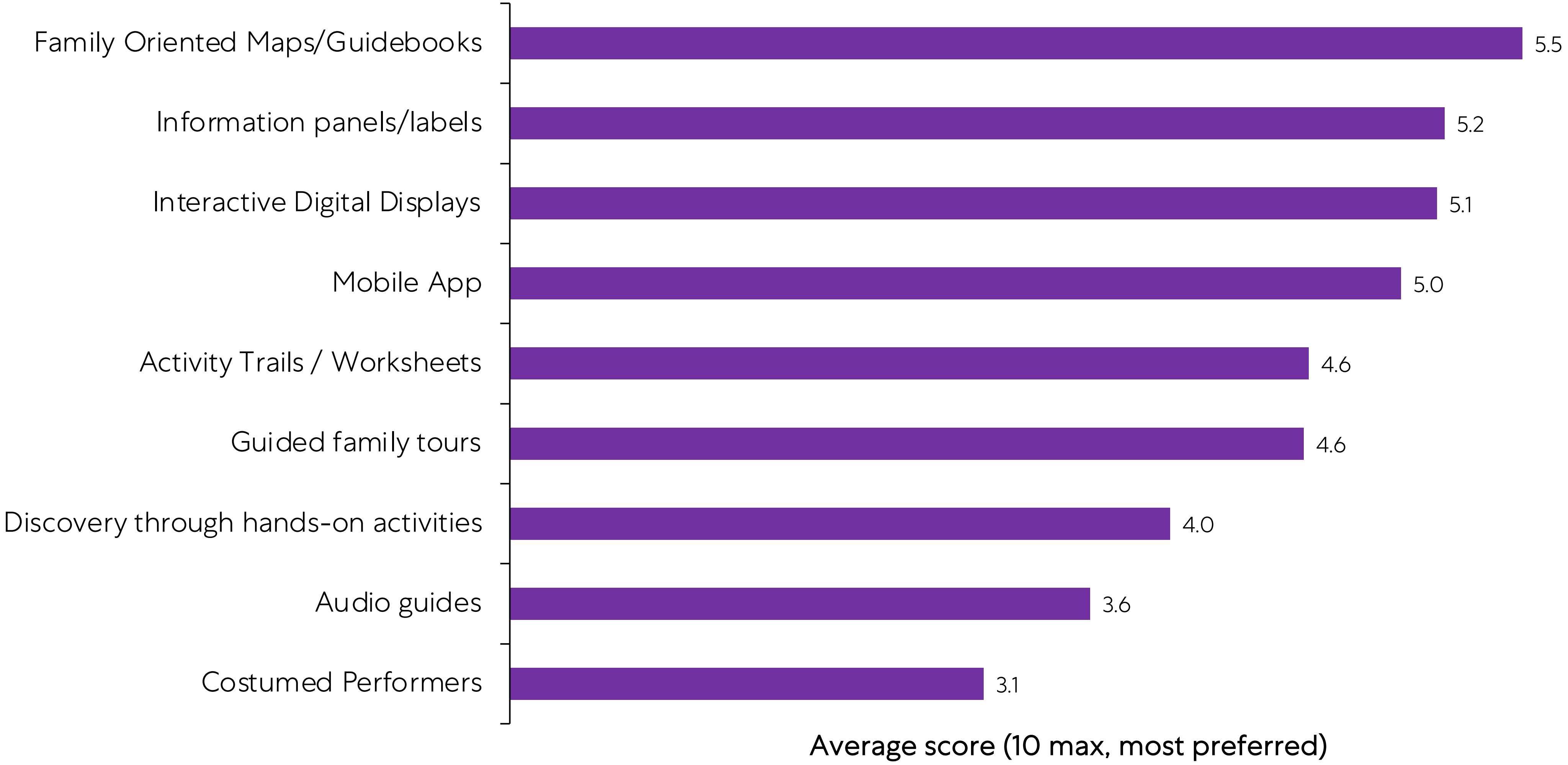
How would you prefer information to be presented during your visit?



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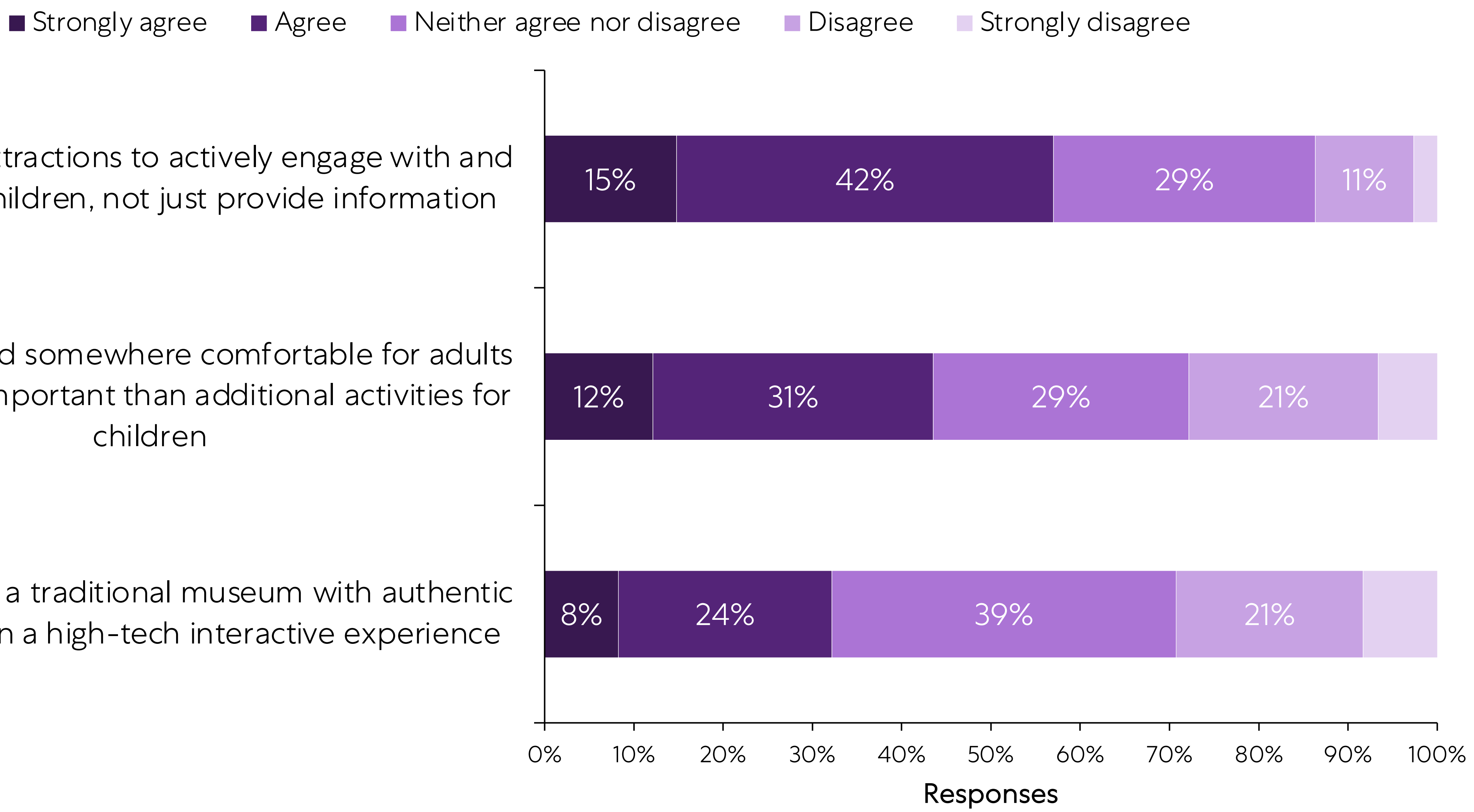
How much do you agree with the following statements?



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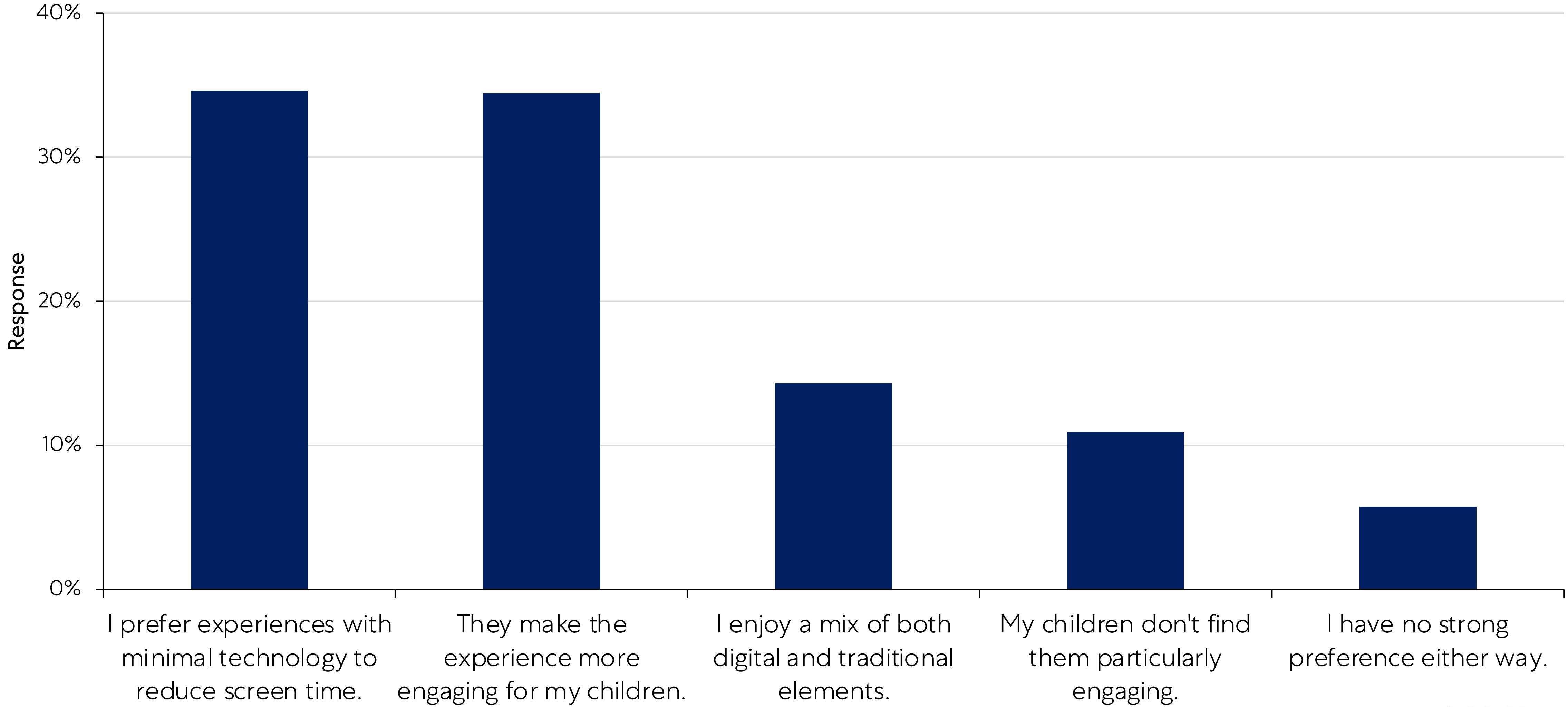
Thinking about digital or technology-based elements at attractions (e.g., interactive screens, apps), which of the following statements reflect your views?



n=1,063

Special Educational Needs

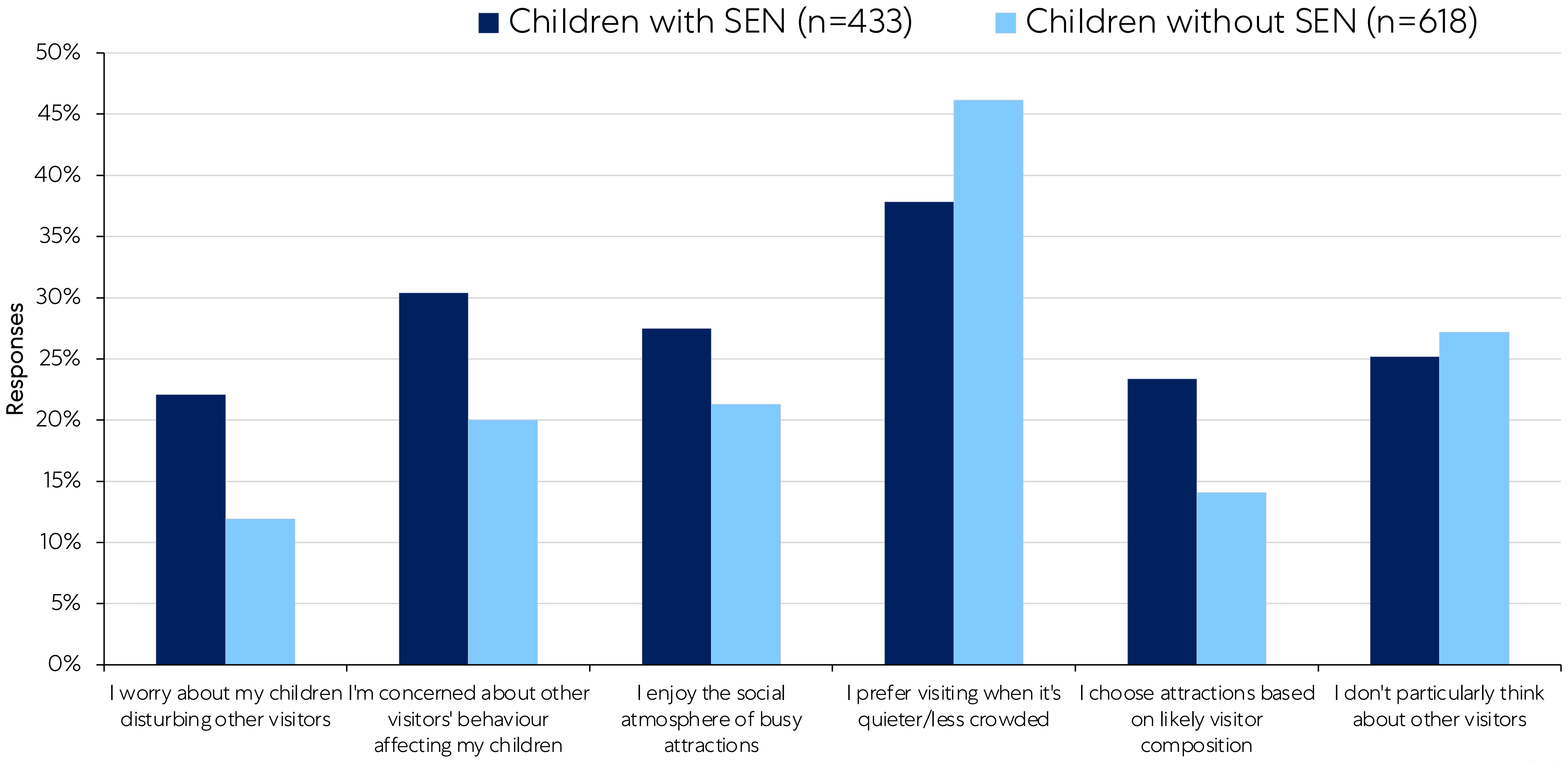
The survey explored some specific questions around Special Educational Needs

- Families with children that have special educational needs or requiring additional support with their learning and development represent 41% of responses, above national benchmarks.

- The key words which these families are looking for in a day out are accessibility, and also adventure, awe and challenge.
  - Families including members with SEN value traditional museums, and are also excited about the possibilities with digital innovation.
  - These families said they were more likely to make a return visit because of a changing exhibition programme (implying that re-visiting settings which they have previously enjoyed is of greater importance), finishing an incomplete visit, membership, or visiting with other friends / family.

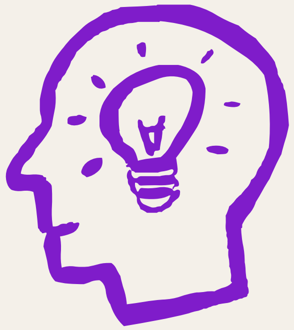
- In terms of facilities:
  - Respondents value great staff interaction, and also a good café – even one more geared to grown ups.
  - Much more likely to view free WiFi and quiet, sensory spaces as essential.

How do you feel about other visitors when at family attractions?
(Select all that apply)



Top takeaways

1



Re-define value: create memories, rather than selling dwell time

Families don't measure value in hours spent or activities ticked off. They're investing in joy, connection, and stories they'll tell for years. Design for emotional return and memory-making.

2

Own your unique, premium, emotional territory

Position your attraction as a category of one, delivering a value proposition that families can’t find elsewhere. When families can only get *that* feeling at your attraction, price becomes secondary to the memories you deliver.

3

Ensure every family belongs.
Be authentically accessible.

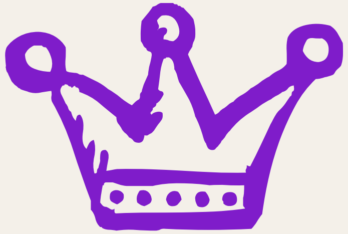
True accessibility isn't about compliance – it's about creating spaces where every family feels genuinely welcomed, understood, and celebrated. Empathetic service and design is important to all, but especially those with Special Educational Needs.

4

Children drive the decision to return

Design experiences where children feel like explorers and decision-makers, while parents see clear value. Children's enthusiasm drives repeat visits, peer influence, and brand advocacy.

5



Be the highlight, not the whole day

Families build days, not visits. Don’t compete with the everyday - complement it. Create add-ons and partnerships, engaging with free alternatives. Be the unforgettable peak moment – the part worth paying for.

Implementation guide for a family-focused experience

Stage	Tactic	What to Do	Why It Matters
Pre-Visit	Optimise the Information Journey	• Show clear, complete pricing (no hidden extras) • Provide "what to expect" guides; Include family-centric imagery and language • Detail accessibility, food, toilets, and travel	Families need clarity and reassurance. Early confidence builds trust and drives conversion.
Booking	Streamline for Spontaneity	• Simplify mobile booking; Show live availability • Enable instant confirmation • Use timely nudges, e.g. "Plan your weekend now"	44% book within 48 hours - friction at this point means lost income.
On-Site	Deliver Family-Friendly Navigation	• Offer printed or downloadable family maps • Highlight rest areas and family facilities • Provide child-led trails or simple choose your own activities	Empowering children and reducing stress boosts satisfaction and dwell time.
Experience	Empower Frontline to Delight	• Train staff to engage children meaningfully • Enable small surprise moments (stickers, badges) • Support warm, empathetic welcome for SEN families	Personal connection is often the most memorable part of the visit.
Messaging	Sell the Emotional Outcome	• Shift from "what's on" to "how it feels" • Use real family quotes and photos • Talk about joy, memory, connection	Families aren't buying content - they're buying moments that matter.
Post-Visit	Incentivise the Return	• Offer bounce-back incentives • Send thank-you follow-ups • Introduce simple memory-collecting schemes	Follow-up drives loyalty, retention, and long-term revenue.

Thank you for reading

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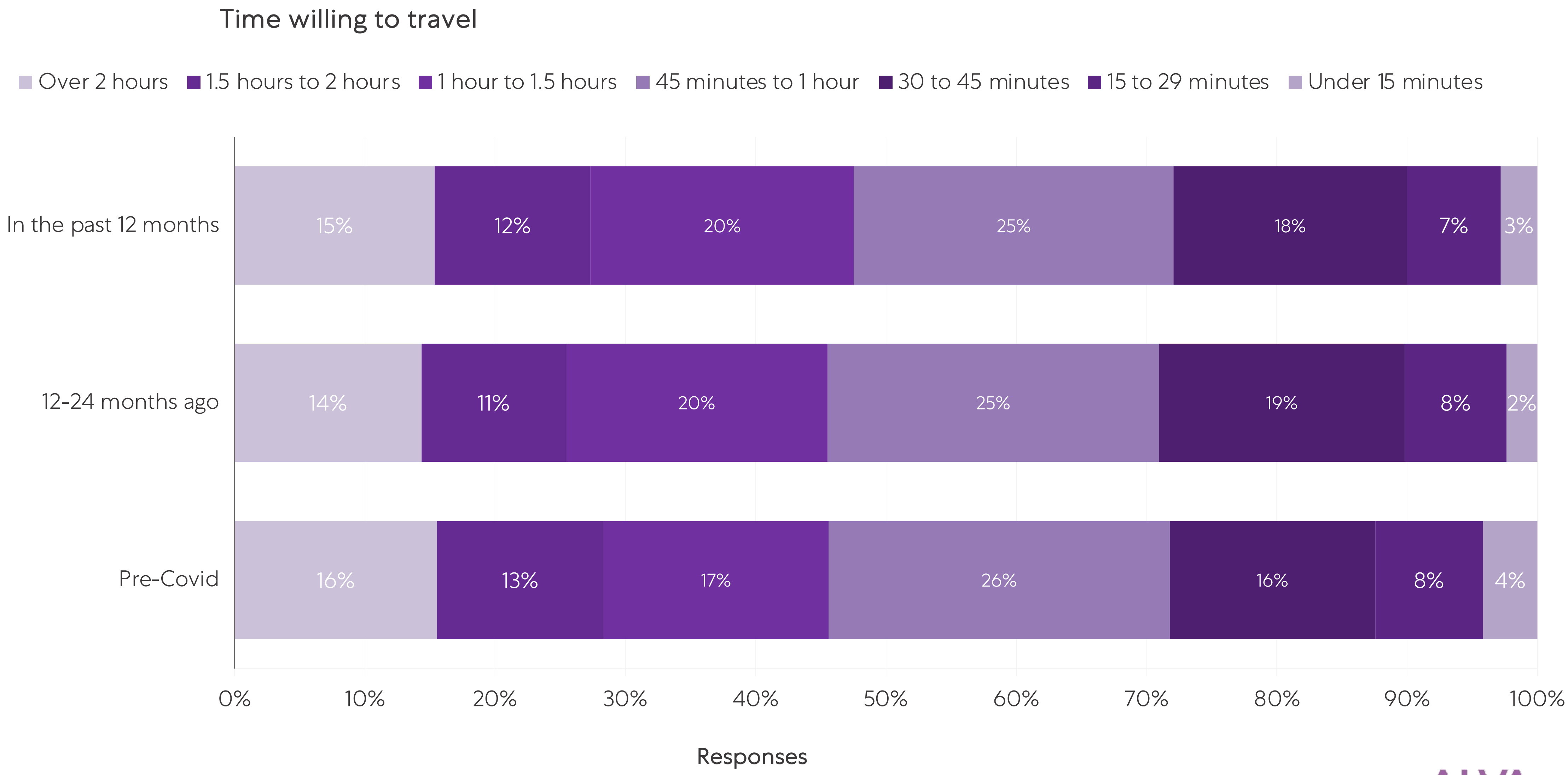
Appendix

Number of visits; typical spend; distance



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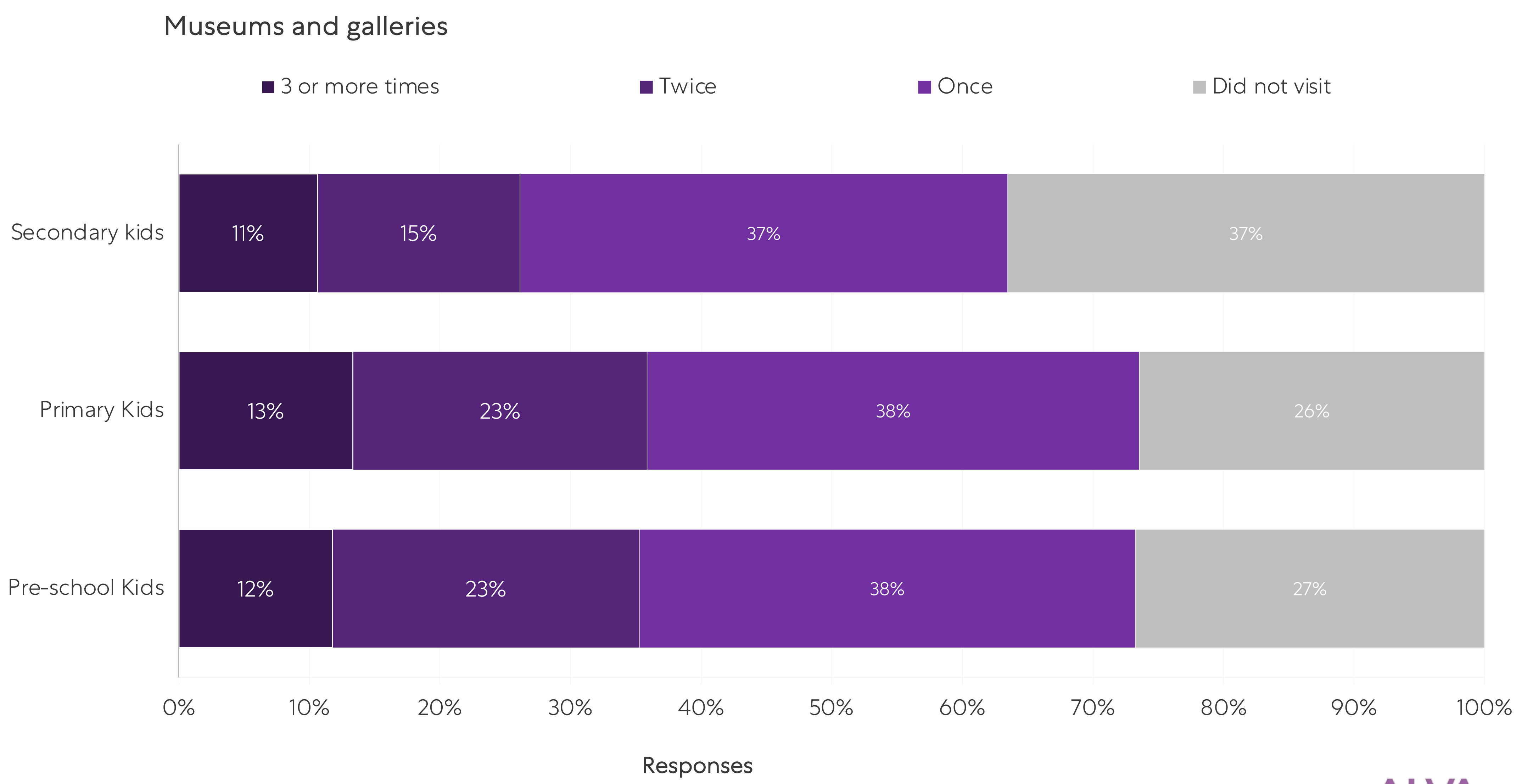
How often did your family visit these types of places in the last 12 months?



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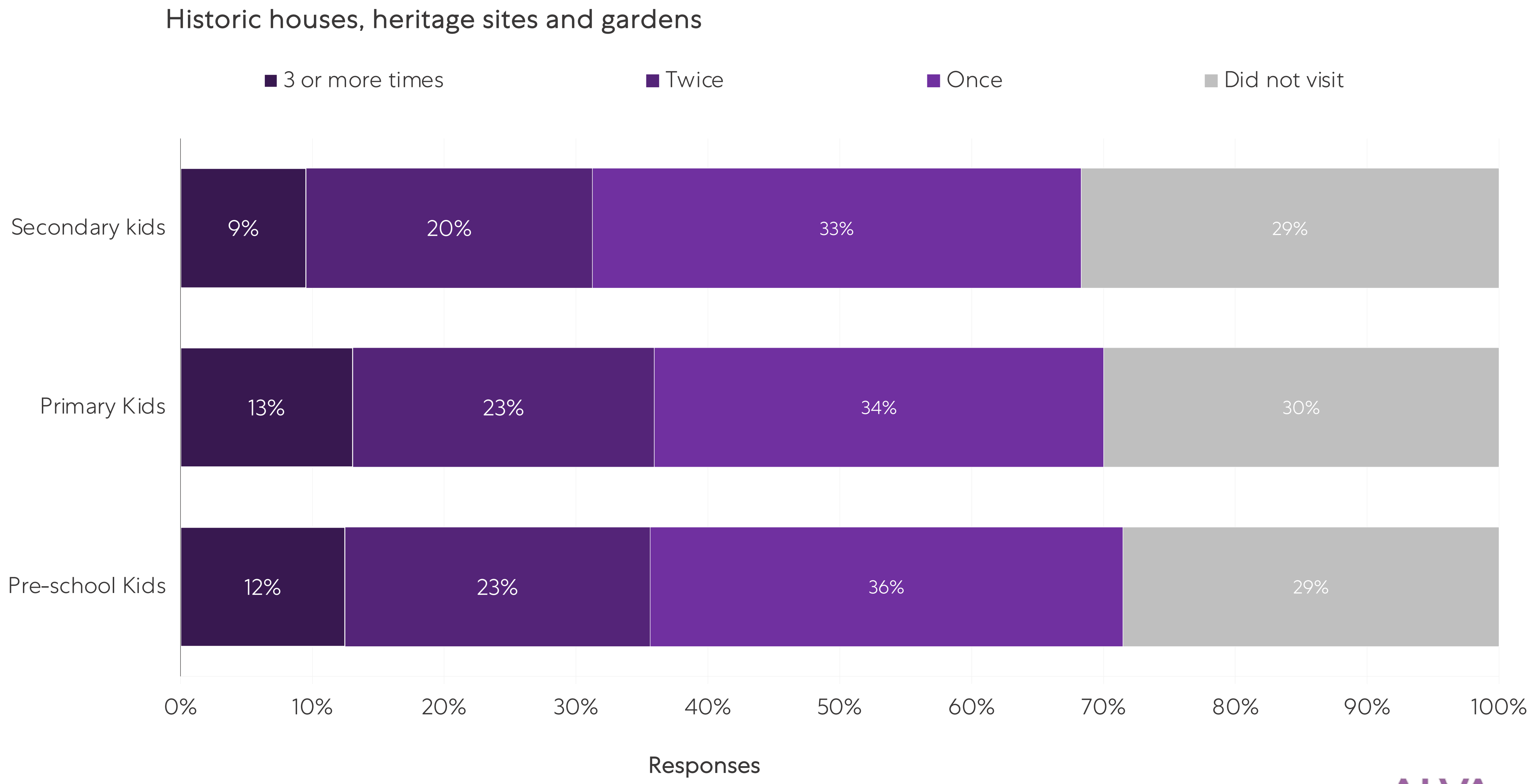

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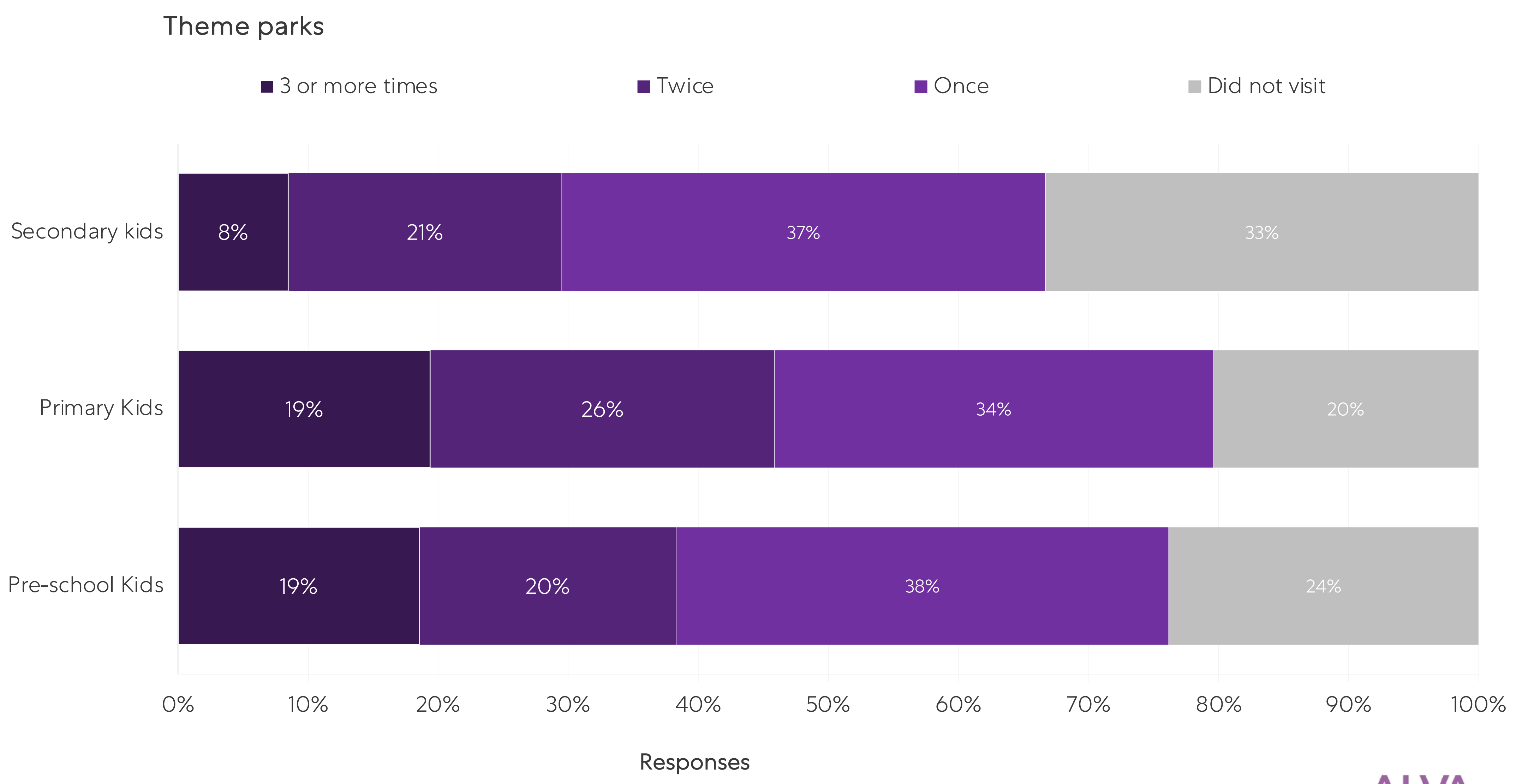

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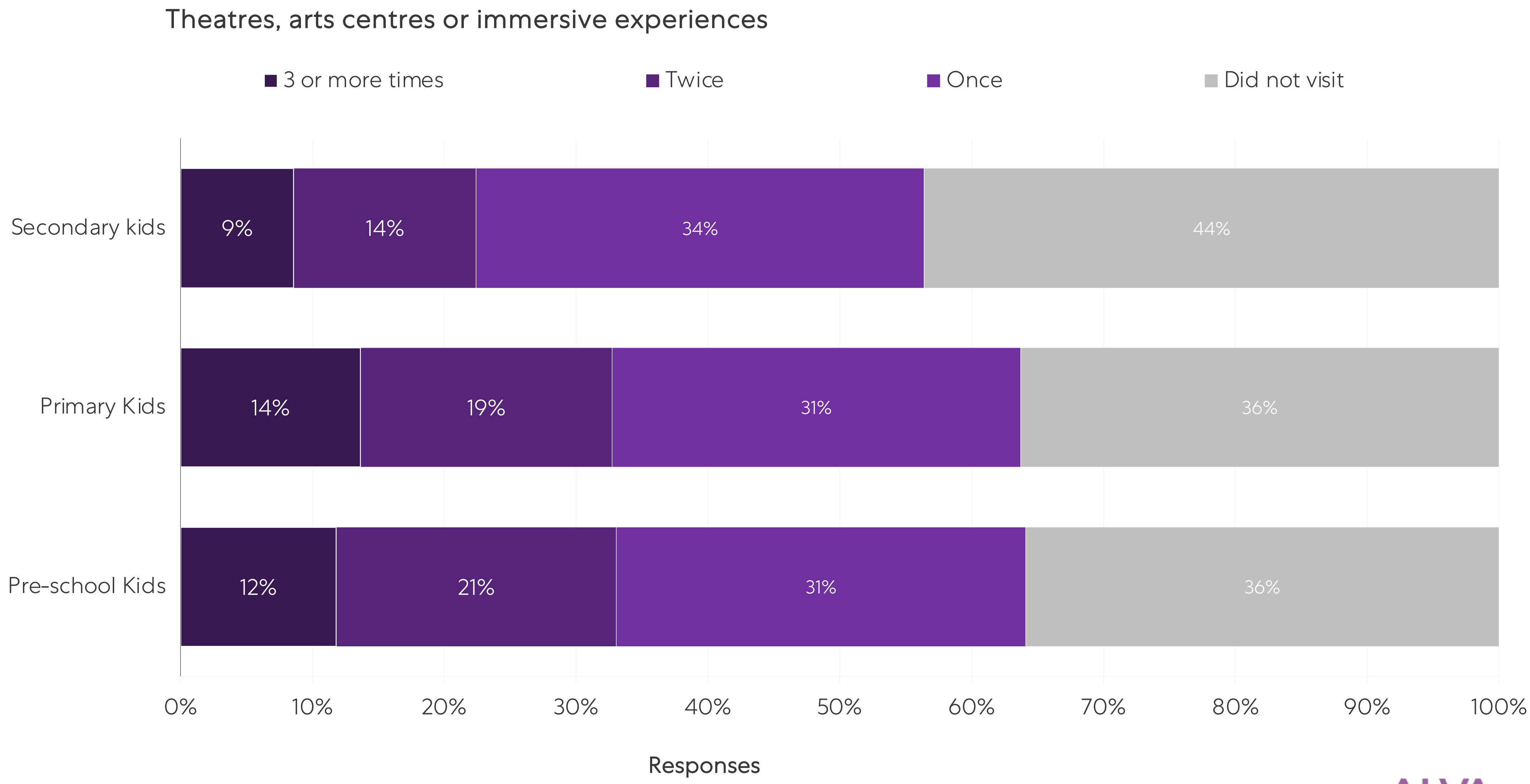

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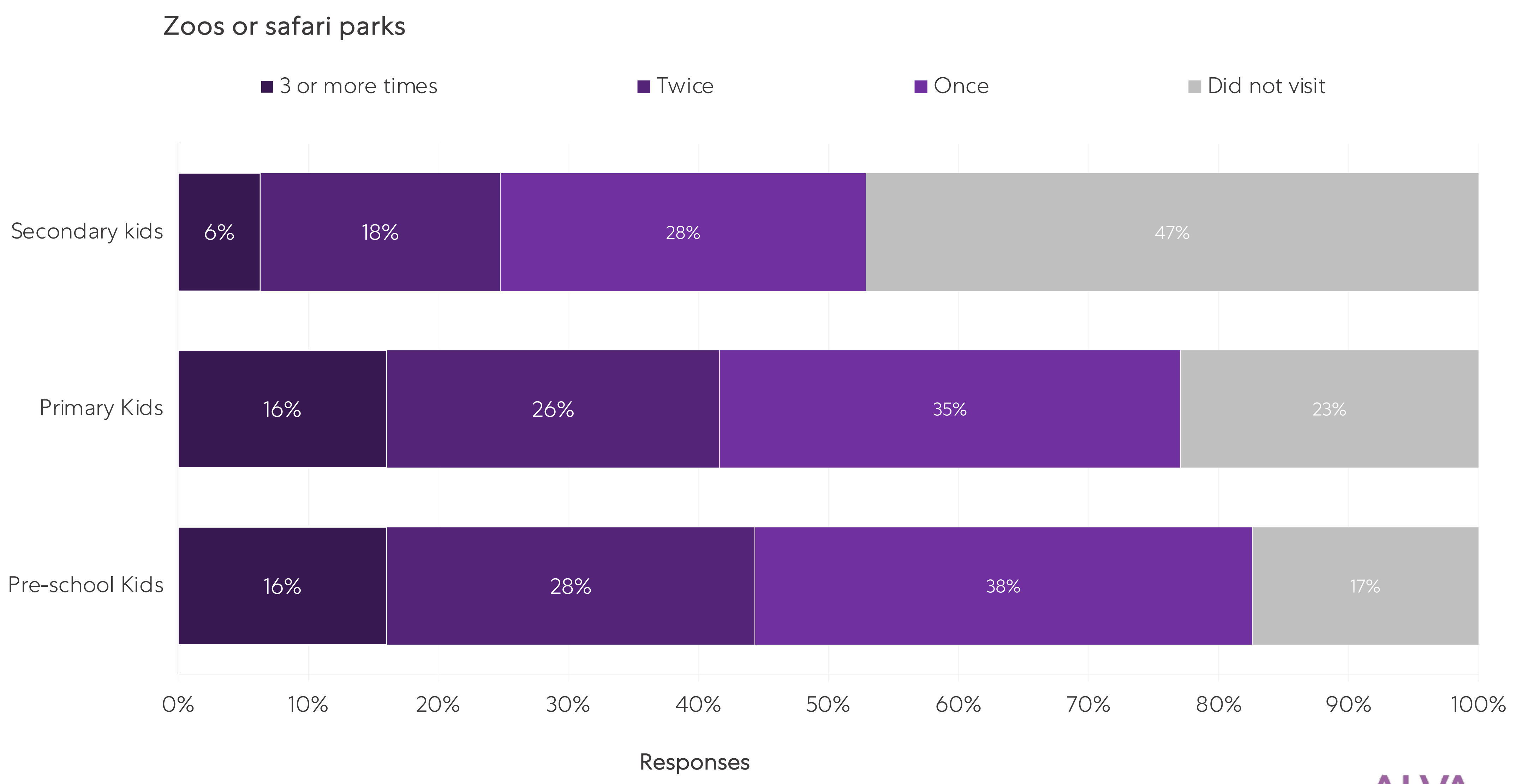

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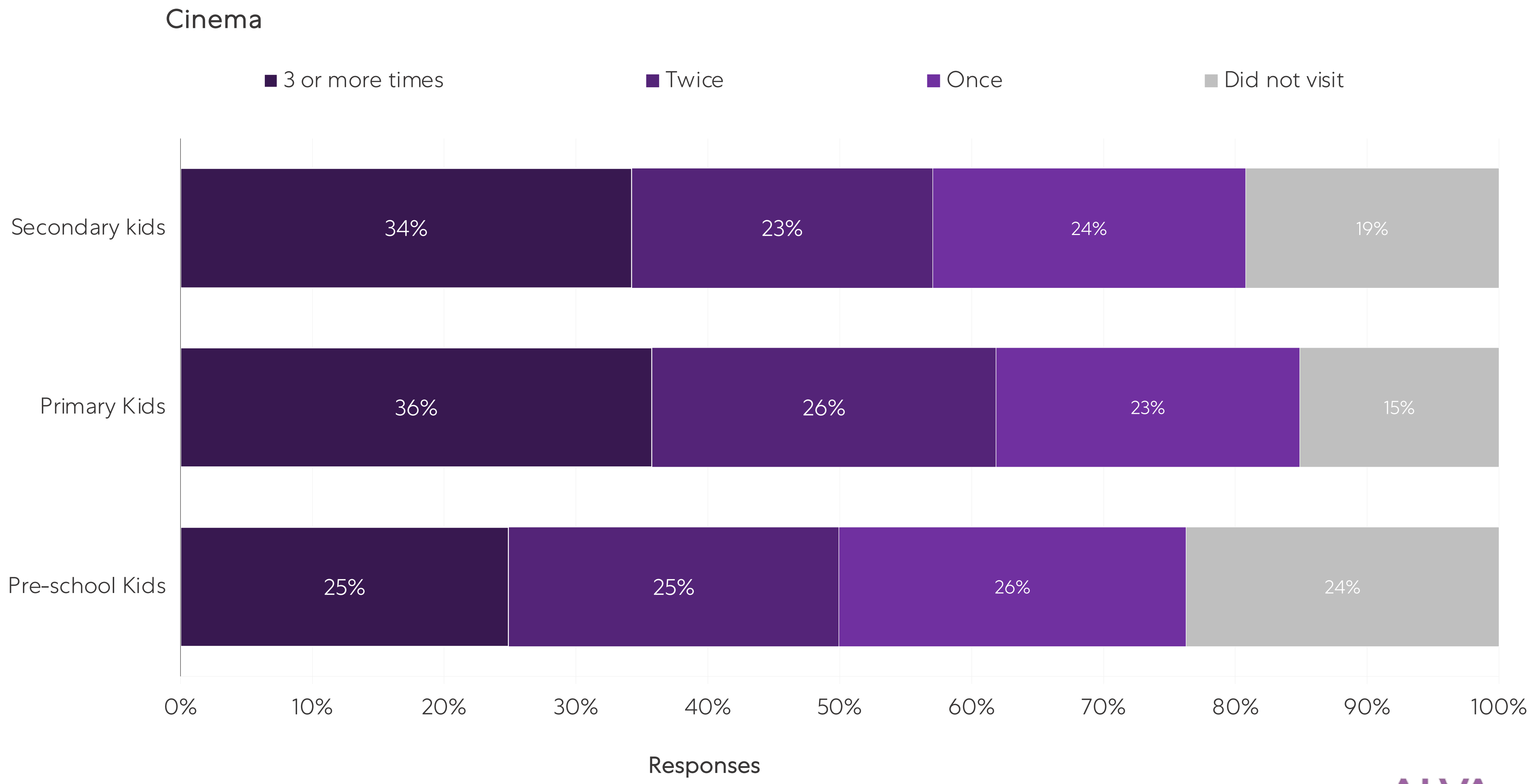

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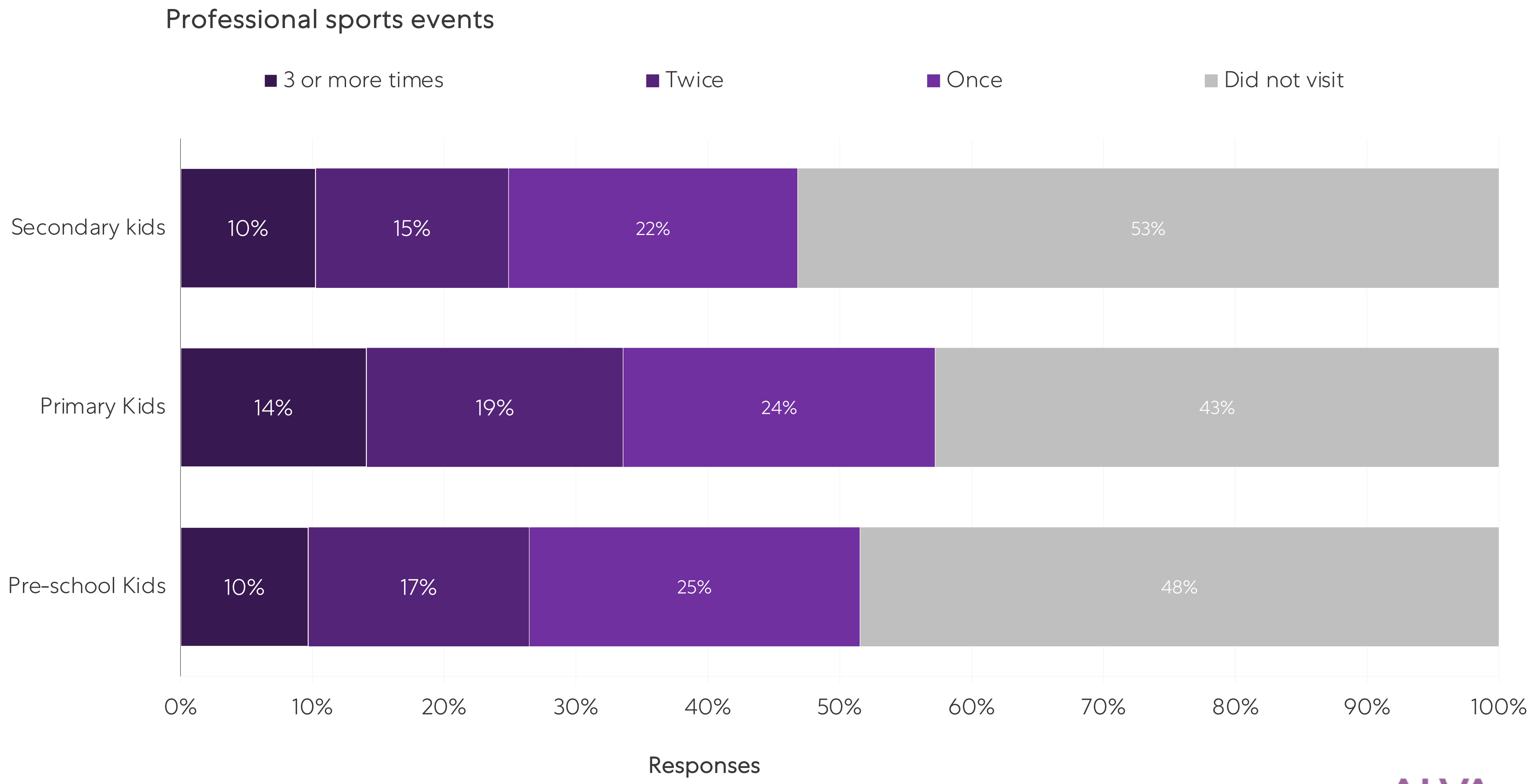

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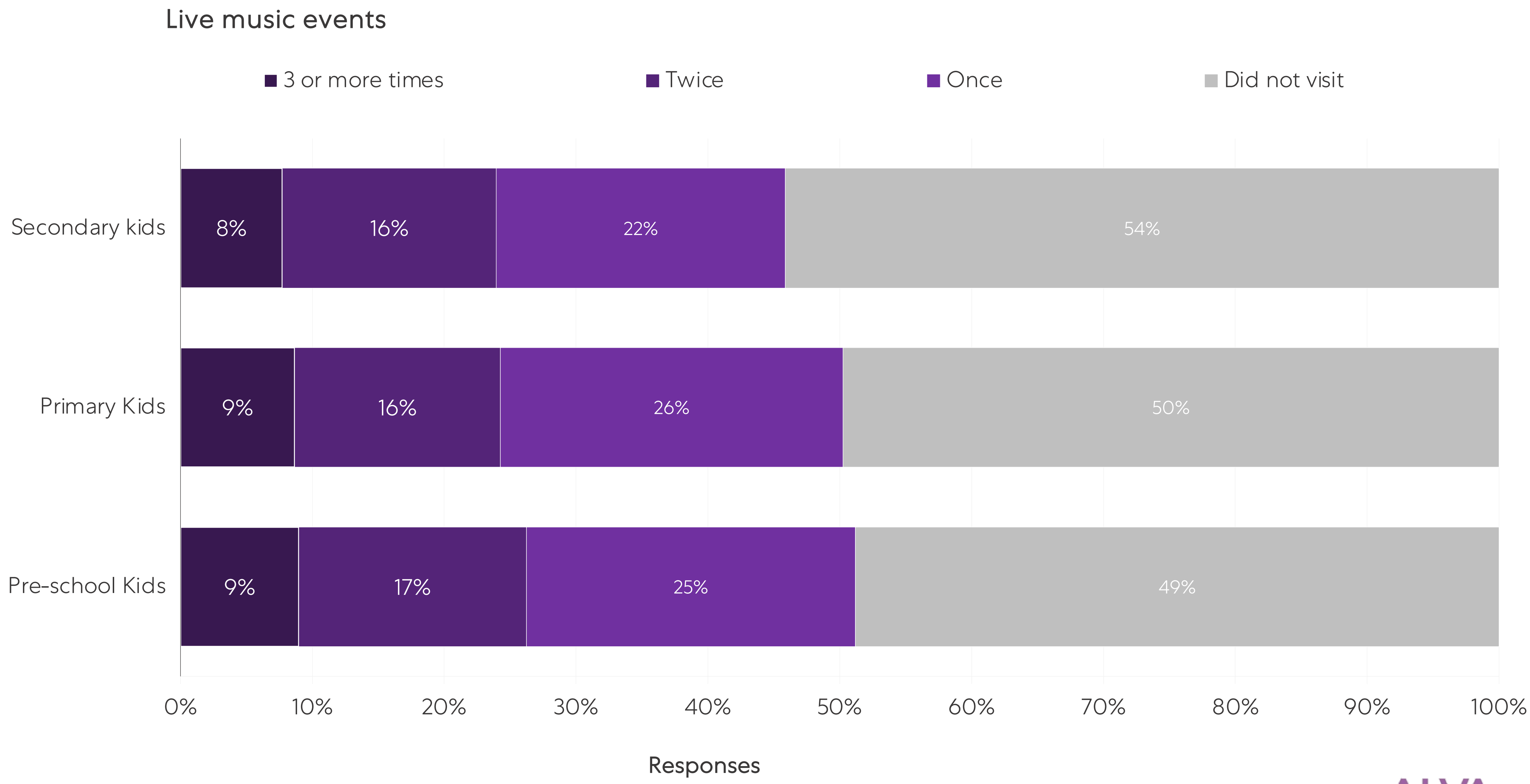

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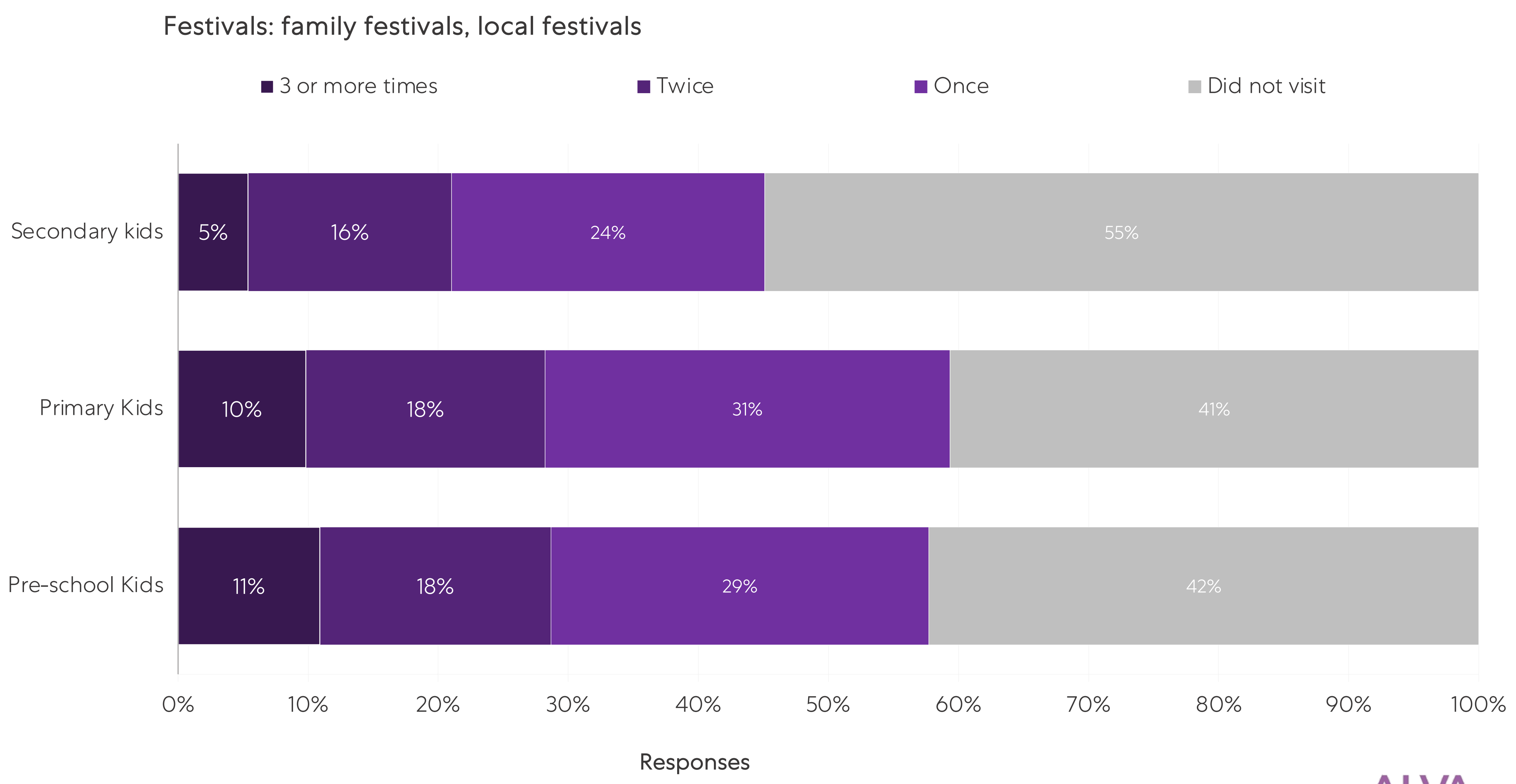

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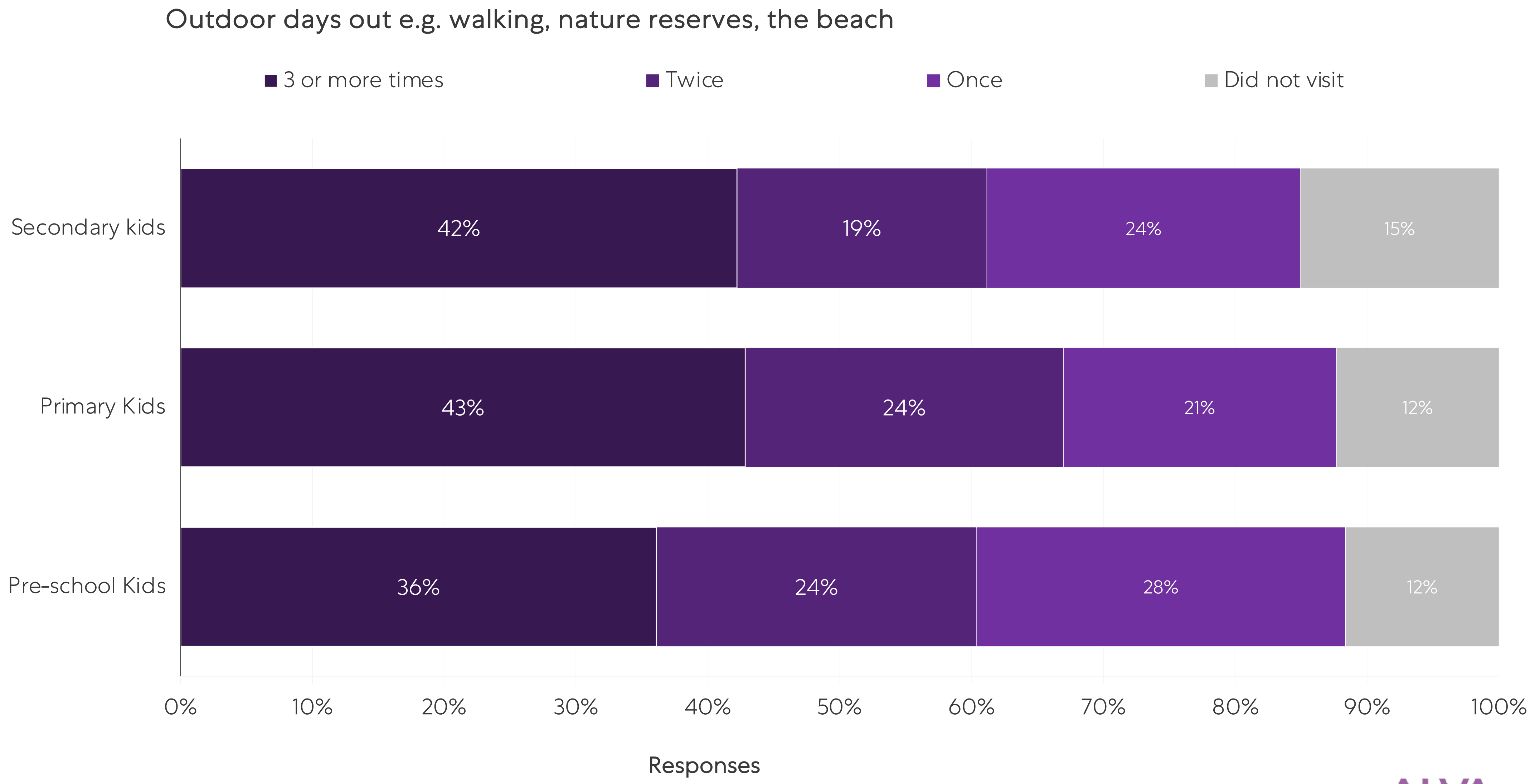

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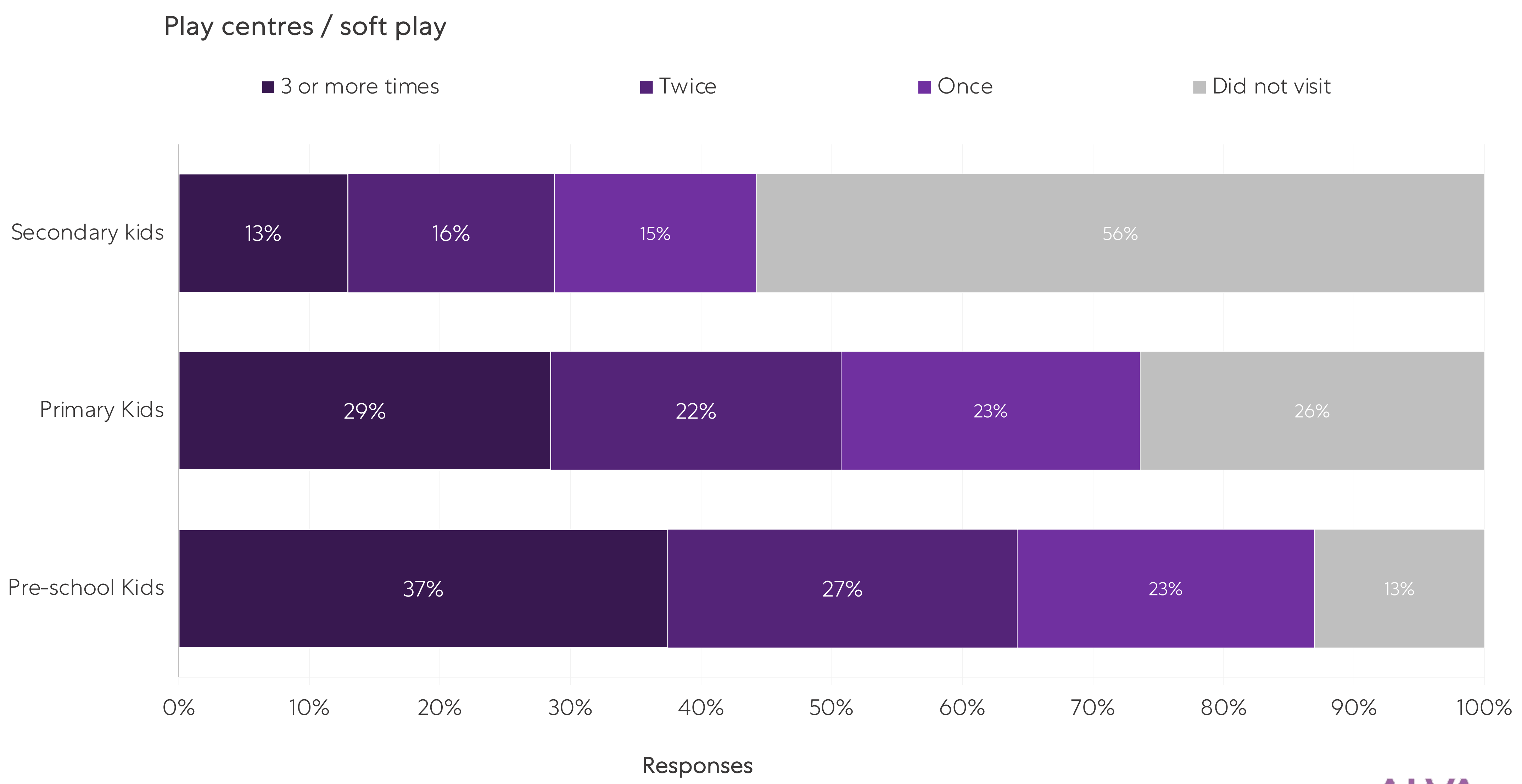

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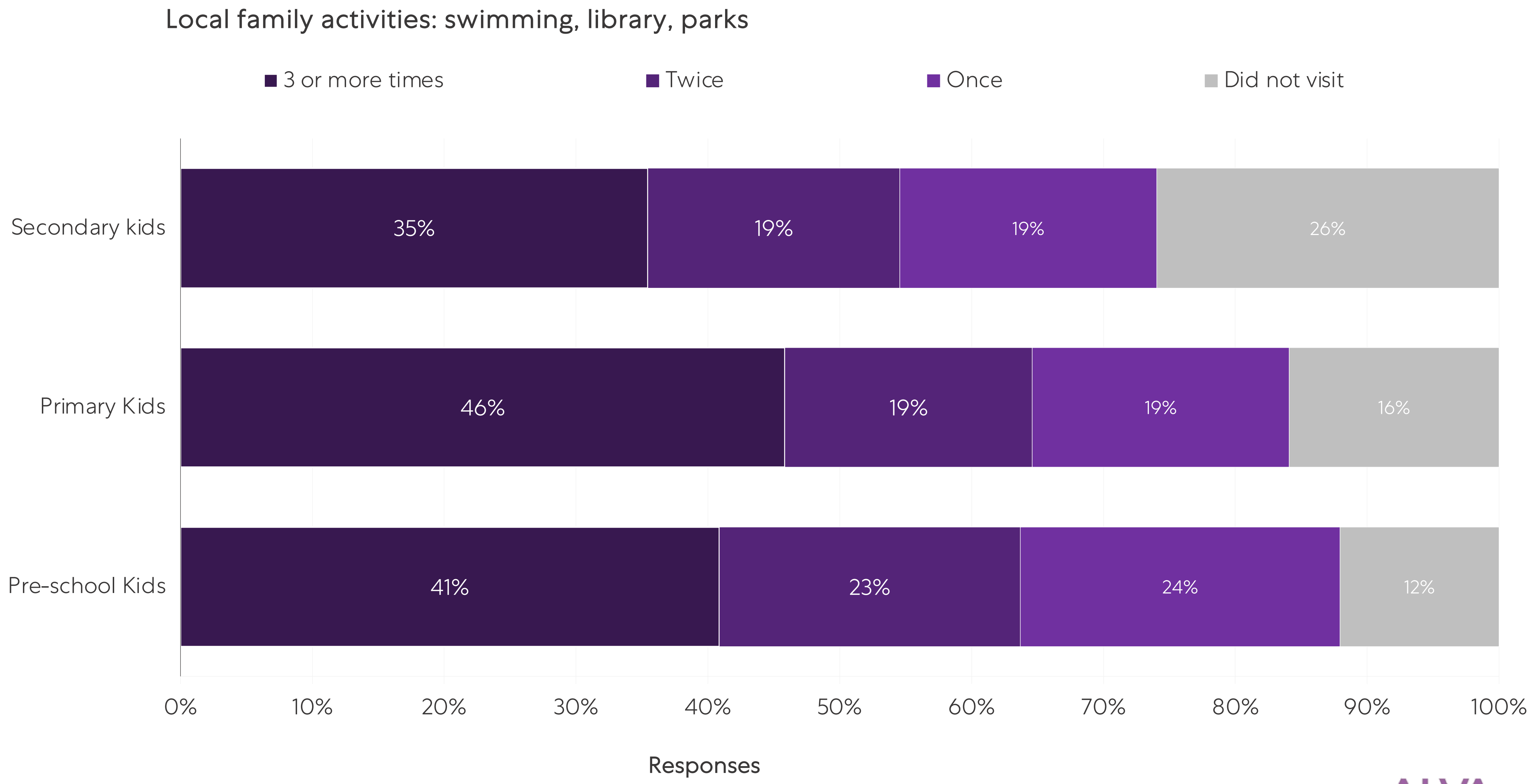

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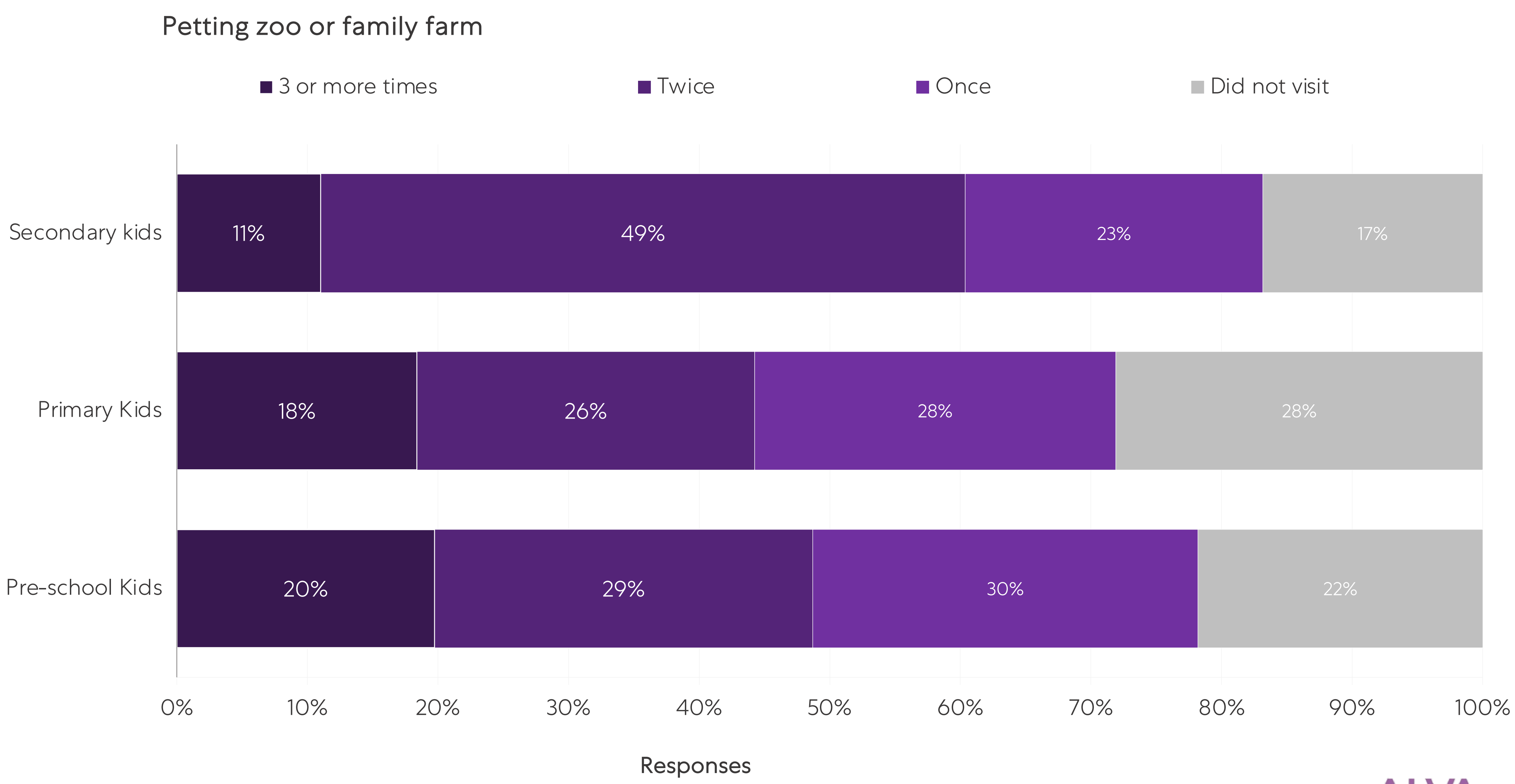

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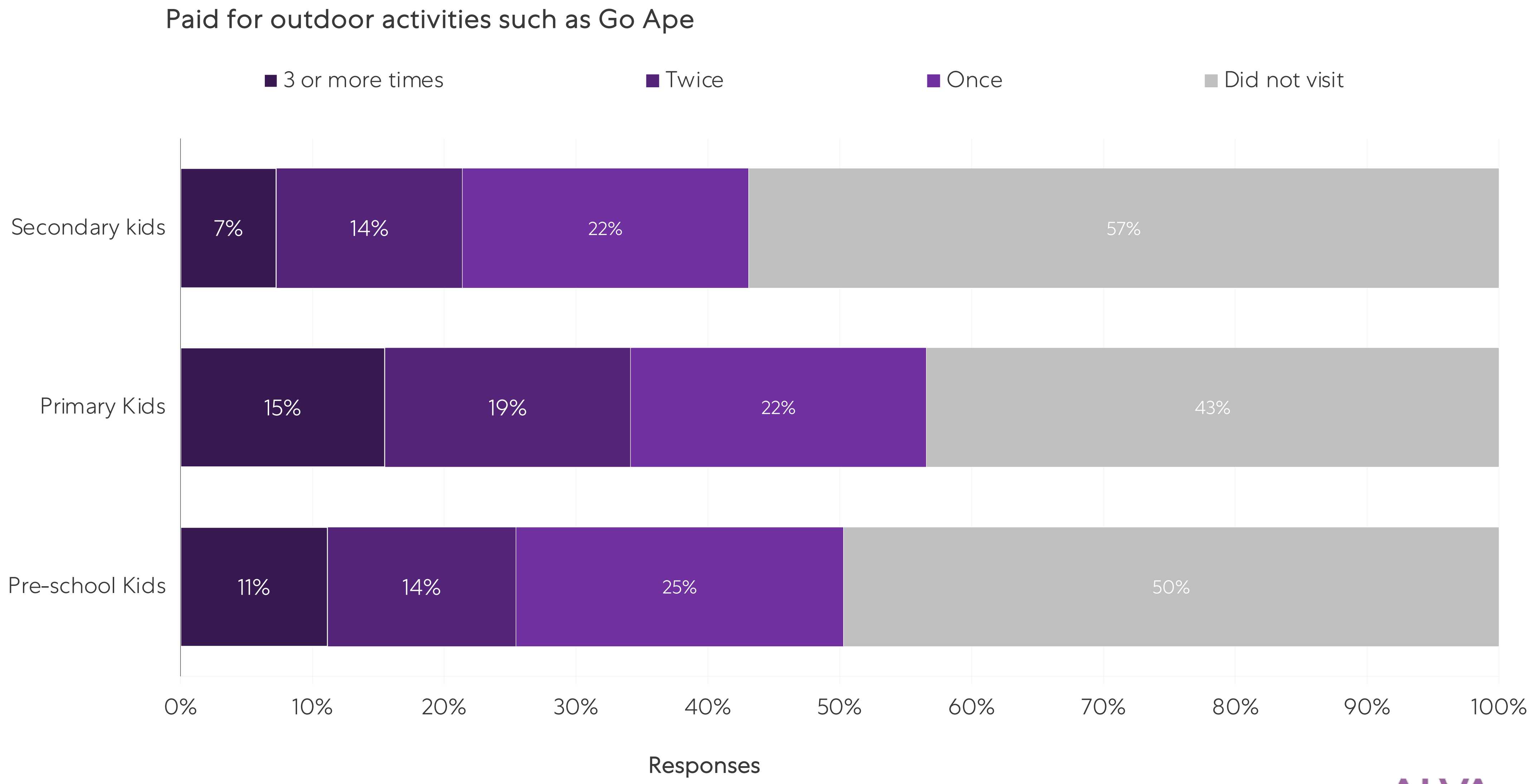

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Imagine you've been put in charge of creating the perfect family attraction. What would you include to make families like yours excited to visit? Consider aspects like activities, facilities, the overall experience etc.

n=1,063